

April | 11



# User's Manual Zultys MXreport™ Version 2

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## **1 Introduction**

### **1.1 Call Detail Records (CDR)**

The Zultys MX Unified Communications Operating System manages your MX phone system. One of its functions is to maintain a database of call detail records (CDR) for all call sessions. Each CDR record contains **over 50 fields** of call data information. The data fields stored in the CDR database can be searched based on selection criteria, extracted and formatted into meaningful enterprise-wide management control reports.

The MX system initially comes with over 34 comprehensive, preformatted CDR management reports, which are accessible on demand from the MX Administrator interface. See Appendix A for a listing of these reports.

Zultys customers have requested the ability to have more granular control in accessing, retrieving and reporting on this data.

**MXreport provides this customized reporting.**

### **1.2 Call Center/Call Group Records**

In addition to maintaining enterprise-wide call data, the Zultys MX Unified Communications Operating System is able to extract and report on call data by Operator Group, ACD Group, Hunt Group, and Call Center Group. This data can be used to provide meaningful group management reports.

### **1.3 MXreport**

**MXreport is an advanced report writer software client running under Microsoft Windows. It gives a call center Supervisor, a Manager or a System Administrator the ability to access easily the CDR database and extract, sort, calculate and group meaningful data into customized management reports.**

With MXreport, you can modify the appearance of an existing report or create new reports, and newly created reports can be saved as report templates for repeated use.

## **2 MXreport Preparation**

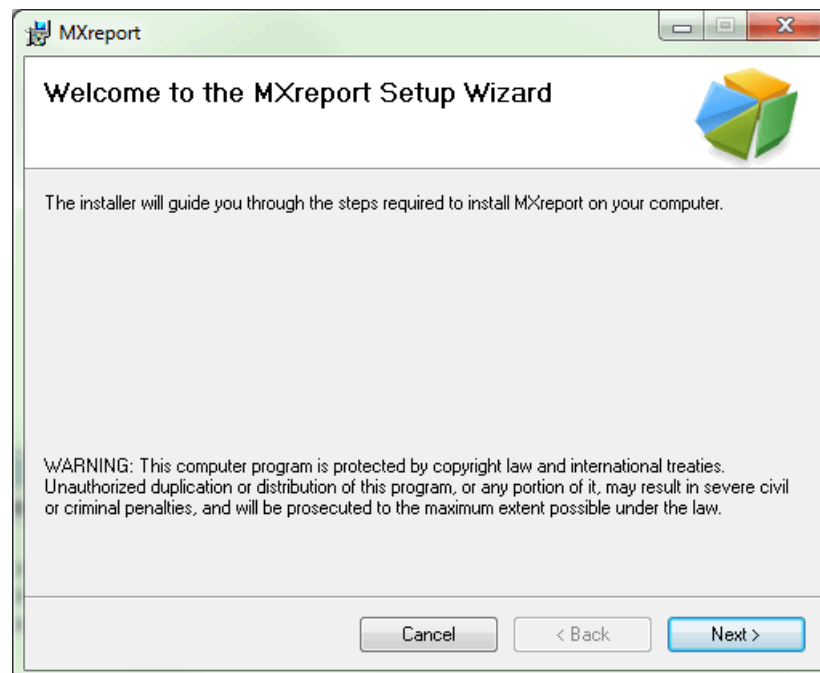
In order to run MXreport, the user needs to meet the following requirements:

- The MX PBX system is running MX software v.6.0 or higher.
- The appropriate MXreport system license(s) are installed on the MX PBX system.
  - MXreport (CDR) – Provides access to CDR reports
  - MXreport (ICC) – Provides access to Call Center/Call Group reports
- The MXreport user is running either a 32-bit or 64-bit version of Microsoft Windows 7, Windows Vista, or Windows XP.
- The MXreport user has downloaded and installed a copy of the MXreport client software.

### **3 Basics**

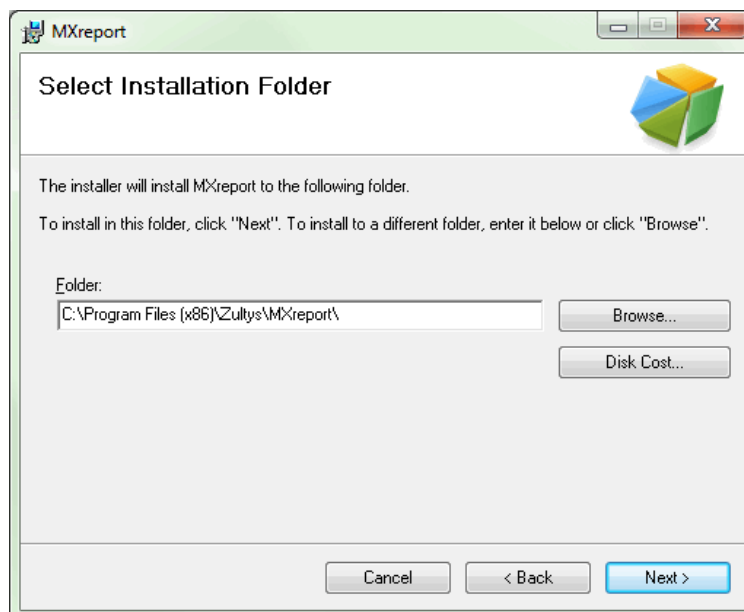
#### **3.1 Installing MXreport**

1. Download the MXreport software.
2. Run the MXreport *setup* program to install the software on user's PC.
3. The MXreport set-up window opens.

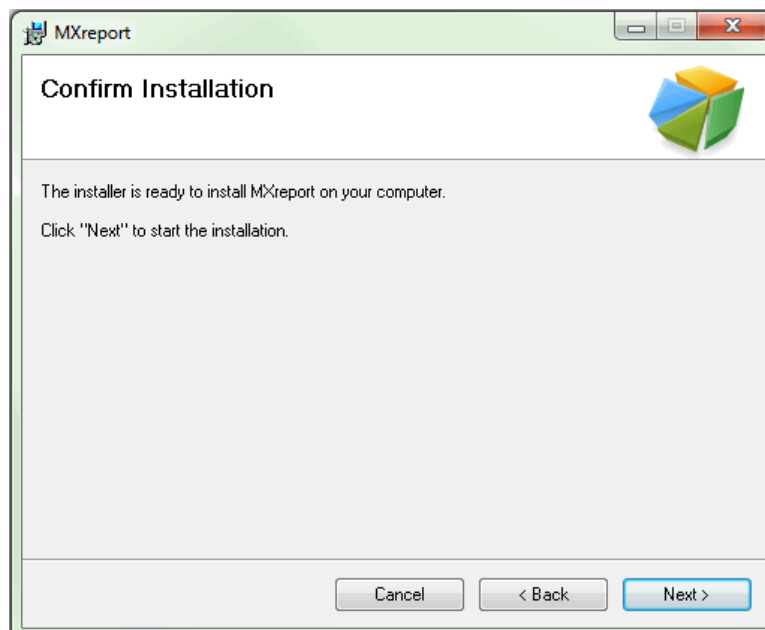


4. Click **Next**.

5. Select the installation folder and click **Next**.

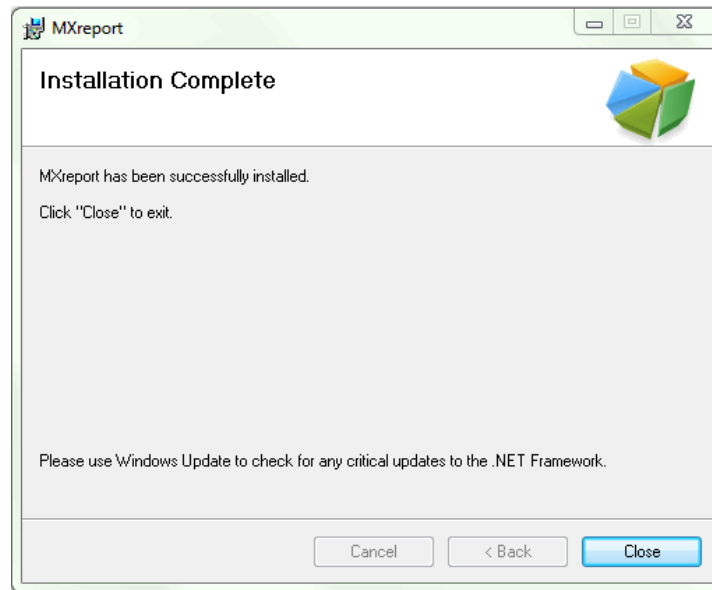


6. Click **Next** to confirm installation.





7. The MXreport client software is installed on the user's PC.



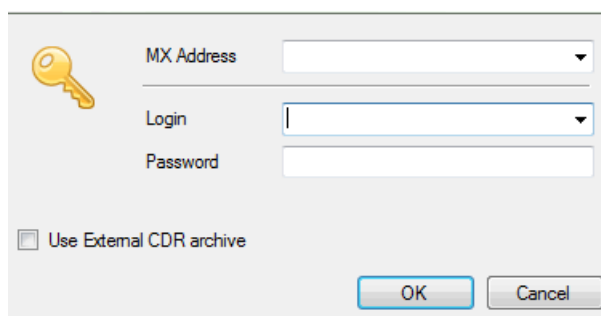
8. Click **Close** to complete.
9. **NOTE:** MXreport uses version 3.5 or higher of Microsoft .NET Framework, a component of the Microsoft Windows operating system. If a lower-level version is installed on user's PC, the MXreport installer will prompt user to run Windows Update.

### 3.2 Starting MXreport

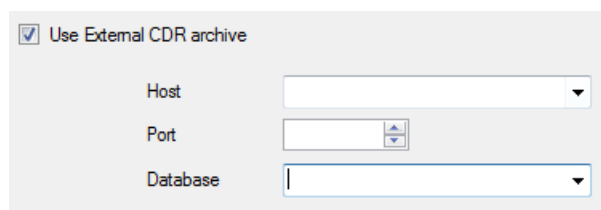
1. Click on the MXreport link to open the program.



2. In the **MXREPORT LOGIN** window, complete the three field entries.

The MXREPORT LOGIN window. It contains a yellow key icon on the left. To the right of the icon are three input fields: "MX Address" (a dropdown menu), "Login" (a dropdown menu), and "Password" (a text box). Below these fields is a checkbox labeled "Use External CDR archive". At the bottom right are "OK" and "Cancel" buttons.

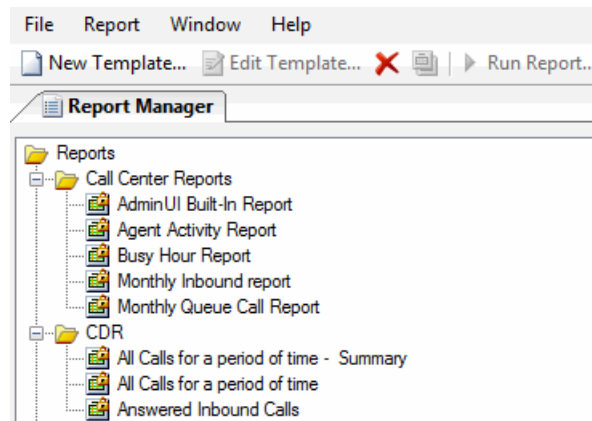
3. If the CDR database being accessed is on an external server, click the checkbox for *Use External CDR Archive* and complete the other field entries.

The MXREPORT LOGIN window with the "Use External CDR archive" checkbox checked. Below the checkbox are three input fields: "Host" (a dropdown menu), "Port" (a spinner box), and "Database" (a dropdown menu).

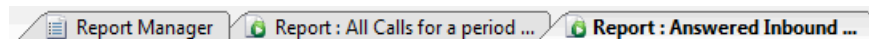
4. Click the **OK** button.

### 3.3 The MXreport Interface

When a user starts MXreport, the main window opens to display drop-down menus at the top, a toolbar beneath and a tabbed **REPORT MANAGER** window on the left. Within the **REPORT MANAGER** window the user will see a list of existing report templates that have been saved in folders. The user can run these reports, clone them for creating new reports or else edit them if they have not been locked (See Section 9).



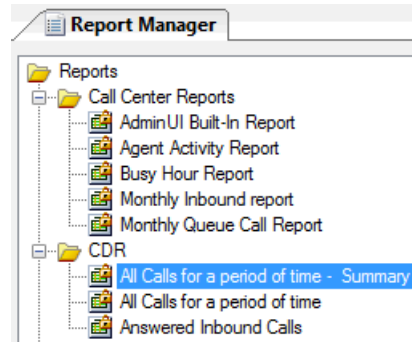
As user edits an existing template, creates a new report template, or prints a report, additional tabbed **Edit:** and **Report:** windows open.



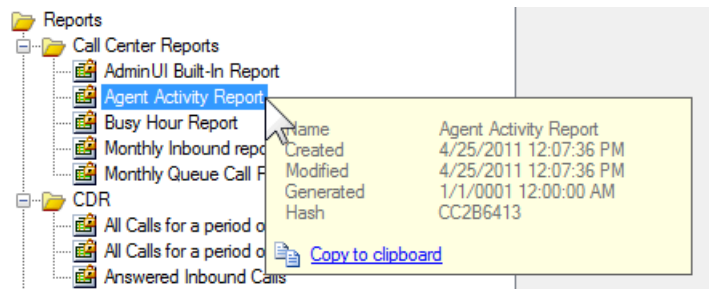
As with the flexible Zultys MXIE unified communications interface client, the user can choose from **multiple ways** to perform the same function, e.g. using a menu selection, clicking on a toolbar icon, right-clicking and selecting from a contextual menu, clicking on a function button, or performing a mouse drag-and-drop. Throughout this manual, these user options are described.

## 4 Running and Printing a Report

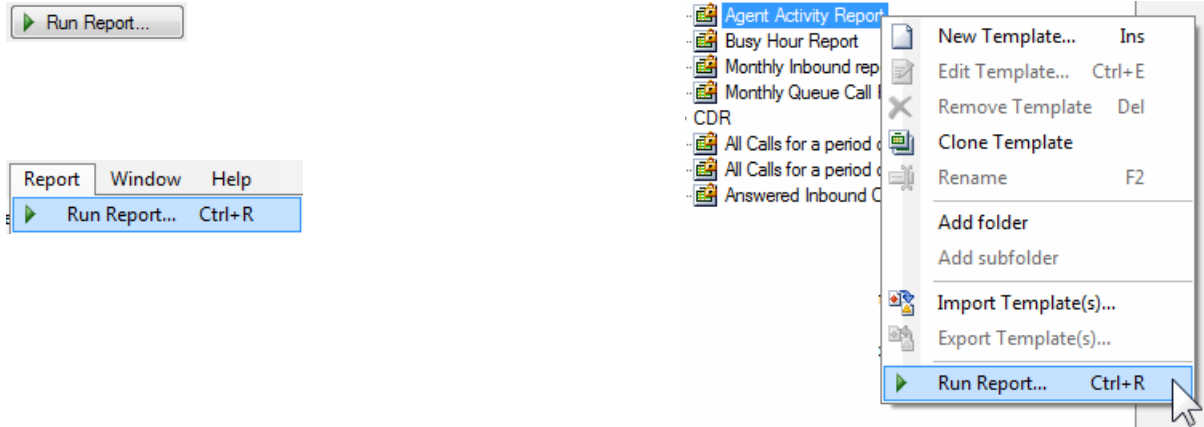
1. Start MXreport.
2. In the tabbed **REPORT MANAGER** window, select the report by clicking on the report template's name.



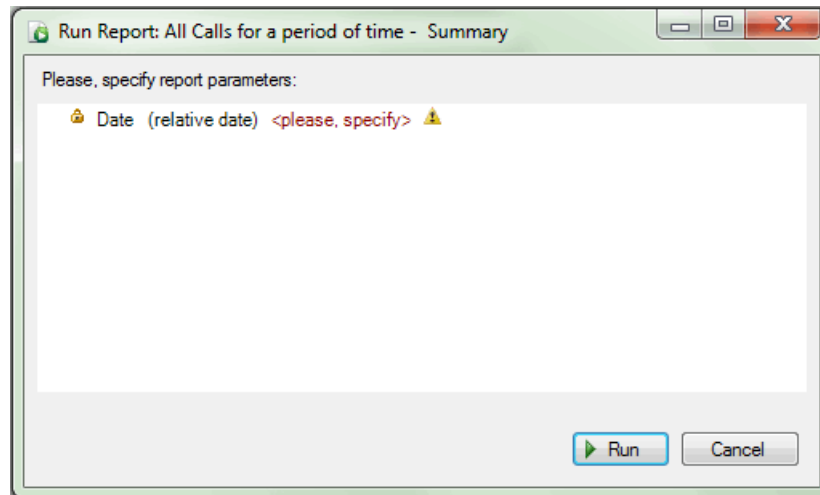
3. Date information about a template can be viewed by positioning mouse on its name and pausing.



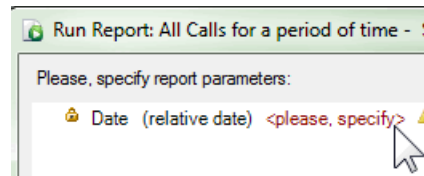
- To run the report, either click on the **RUN REPORT...** button at the bottom of the pane, or click on the **REPORT/RUN REPORT...** menu selection, or click on the toolbar icon **RUN REPORT...**, or right-click on report name and from the contextual menu click on **RUN REPORT...**, or enter **CTL-**



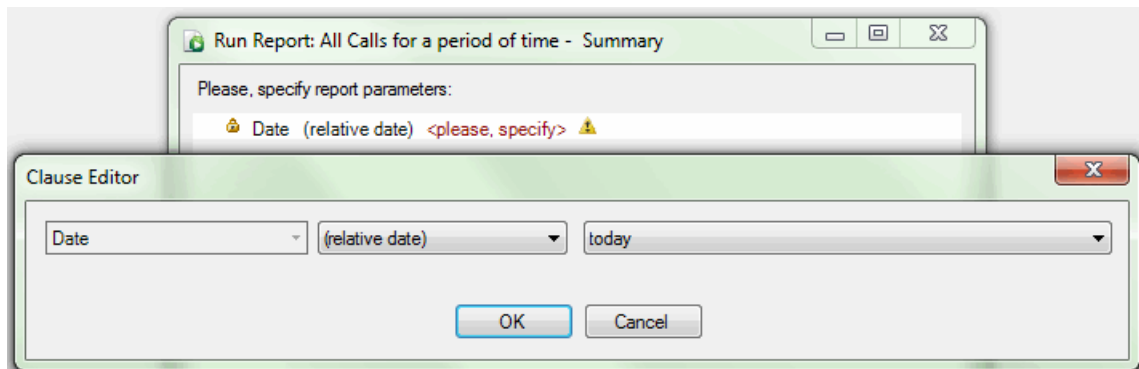
- A **RUN REPORT:** window pops up indicating the report's parameters and the fields for entering variable data, such as, call dates.



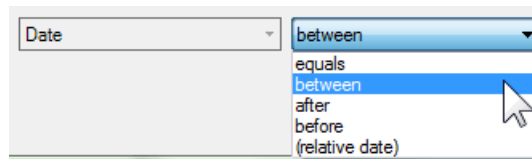
6. Click on the variable parameter *<please specify>*



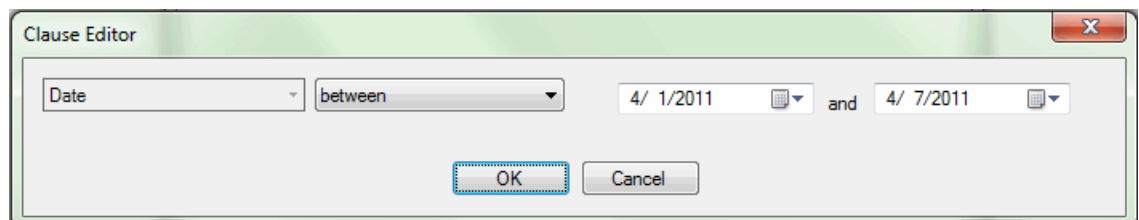
7. A **CLAUSE EDITOR** window opens.



8. Select a Call Date parameter from the Clause Editor drop-down menu.



9. Complete the data entry fields that appear.



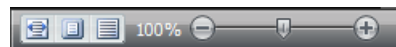
10. Repeat for any other variable parameters.

11. When finished, click **OK** button.
12. Click the **RUN** button.
13. A tabbed **REPORT:** window opens displaying the report.

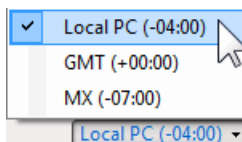
**All Calls (between 4/1/2011 and 4/7/2011)**

Time	Calling party #	Called #	Duration	ACD Name	Agent	Answered	Action	Global Call Id
<b>Call Date : 4/1/2011</b>								
8:16 AM	714	MX.Conference.21911099	02:11:34			Unanswered	End of Call	1107C-73-0015D-53F
8:18 AM	801	4342374300	00:01:07			Answered	End of Call	1107C-73-0015D-540
8:29 AM	4344551695	4083281553	01:58:10			Unanswered	End of Call	1107C-73-0015D-541
8:40 AM	8457425105	4083285433	00:00:27			Unanswered	Transfer	1107C-73-0015D-542
8:40 AM	8457425105	713	00:01:05		713 (Dennis Moran)	Answered	Transfer to VoiceMail	1107C-73-0015D-542
8:40 AM	8457425105	9637474	00:00:41		713 (Dennis Moran)	Answered	End of Call	1107C-73-0015D-543
8:40 AM	8457425105				713 (Dennis Moran)	Unanswered	End of Call	1107C-73-0015D-544
8:41 AM	8457425105	voicemail.713.0	00:01:25		713 (Dennis Moran)	Unanswered	End of Call	1107C-73-0015D-542
9:07 AM	255	713	00:01:07		713 (Dennis Moran)	Answered	Transfer to VoiceMail	1107C-73-0015D-545
9:07 AM	255	9637474	00:00:33		713 (Dennis Moran)	Answered	End of Call	1107C-73-0015D-546
9:07 AM	255				713 (Dennis Moran)	Unanswered	End of Call	1107C-73-0015D-547
9:08 AM	255	voicemail.713.0	00:00:00		713 (Dennis Moran)	Unanswered	End of Call	1107C-73-0015D-545
9:08 AM	255	717	00:02:48		717 (Chad Sanders)	Answered	End of Call	1107C-73-0015D-548
9:13 AM	4344551695	4083281551	00:00:00			Unanswered	Transfer	1107C-73-0015D-549
9:13 AM	4344551695	498	00:00:05			Unanswered	End of Call	1107C-73-0015D-549
9:14 AM	4344551695	4083281551	00:00:00			Unanswered	Transfer	1107C-73-0015D-54A
9:14 AM	4344551695	498	00:00:06			Unanswered	End of Call	1107C-73-0015D-54A
9:19 AM	5634454254	4083280450	00:00:00			Unanswered	Transfer	1107C-73-0015D-54B
9:19 AM	5634454254	498	00:00:06			Unanswered	Transfer	1107C-73-0015D-54B
9:20 AM	5634454254	950	00:00:18			Unanswered	Transfer	1107C-73-0015D-54B
9:20 AM	5634454254	777	00:00:03	TechSupportAdv		Unanswered	Merge	1107C-73-0015D-54B
9:20 AM	5634454254		00:01:55	TechSupportAdv	751 (Paul Chase)	Answered	End of Call	1107C-73-0015D-54F
9:20 AM	721	717	00:06:29		717 (Chad Sanders)	Answered	End of Call	1107C-73-0015D-54D
9:28 AM	4344551695	4083281551	00:00:00			Unanswered	Transfer	1107C-73-0015D-550
9:28 AM	4344551695	498	00:00:06			Unanswered	End of Call	1107C-73-0015D-550
9:33 AM	721	15084001470	00:00:40			Answered	End of Call	1107C-73-0015D-552
9:34 AM	721	4135859950	00:00:13			Answered	End of Call	1107C-73-0015D-554
9:35 AM	721	4137790079	00:05:57			Answered	End of Call	1107C-73-0015D-556
9:39 AM	9145803206	4083280450	00:00:00			Unanswered	Transfer	1107C-73-0015D-557
9:39 AM	9145803206	498	00:00:19			Unanswered	Transfer	1107C-73-0015D-557
9:40 AM	9145803206	950	00:00:18			Unanswered	Transfer	1107C-73-0015D-557
9:40 AM	9145803206	777	00:00:10	TechSupportAdv		Unanswered	Merge	1107C-73-0015D-557
9:40 AM	9145803206		00:06:49	TechSupportAdv	711 (Waren Funderburg)	Answered	End of Call	1107C-73-0015D-559

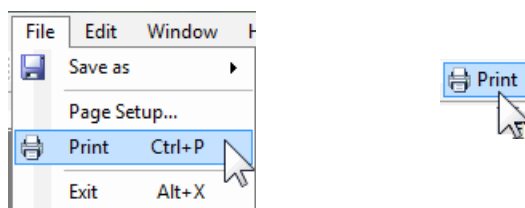
14. At the bottom right-hand corner of the report window is a toolbar for viewing the report. The three icons let you display the report at screen width, full page, and 100%, respectively. The slider lets you view the report at other resolutions.



15. On the taskbar in the lower right-hand corner select the timestamp to use: Local, GMT or MX time.



16. To print the report, either click on **FILE/PRINT** menu, or click on the toolbar icon **PRINT**, or enter *CTL-P*.

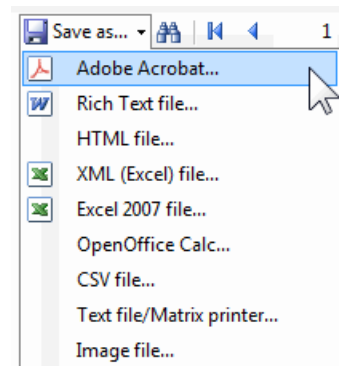
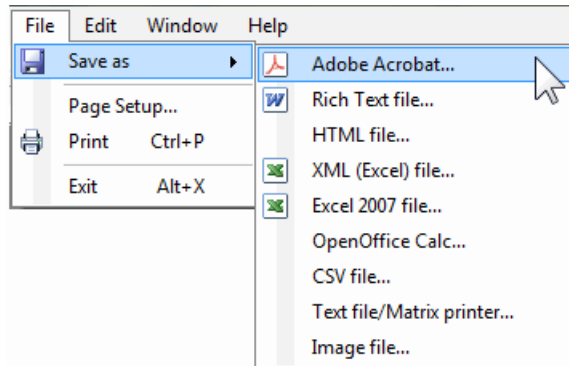


17. Enter your printer selection parameters and click on **PRINT** button.



## 5 Saving or Exporting a Report

- 1 Complete steps 1-13 in **Section 4 - Printing** so that a tabbed **REPORT:** window is open displaying the report.
- 2 Either click on the **FILE/SAVE AS** menu, or click on the toolbar icon **SAVE AS ...**



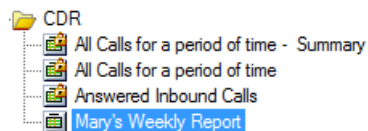
- 3 A drop-down menu displays the following file formats that are available:

<b>ADOBE ACROBAT</b>	Adobe .PDF file
<b>RICH TEXT FILE</b>	Microsoft Word .RTF file
<b>HTML FILE</b>	.HTML file
<b>XML (EXCEL) FILE</b>	Microsoft Excel .XML spreadsheet file
<b>EXCEL 2007 FILE</b>	Microsoft Excel .XLSX spreadsheet file
<b>OPENOFFICE CALC</b>	OpenOffice .ODS spreadsheet file
<b>CSV</b>	Comma separated values .CSV file
<b>TEXT FILE/MATRIX PRINTER</b>	.TXT file
<b>IMAGE FILE</b>	.BMP, .PNG, .JPG, .GIF, .TIF or .WMF

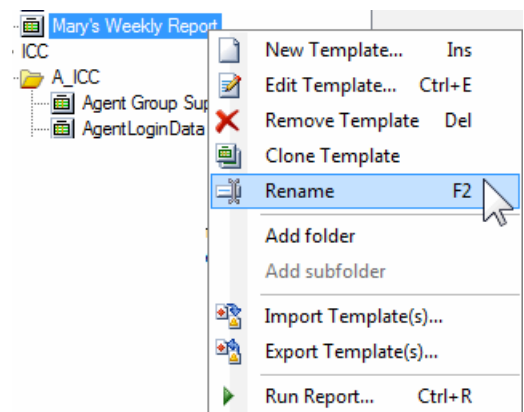
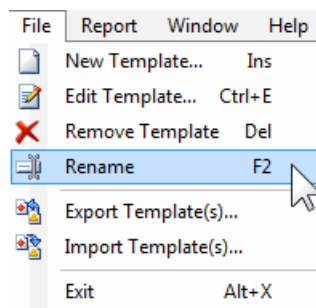
- 4 Make a selection and enter the parameters in the **EXPORT TO** pop-up window.
- 5 Click the **OK** button.

## 6 Renaming a Report Template

1. Start MXreport.
2. In the tabbed **REPORT MANAGER** window, select the report template by clicking on the template name.



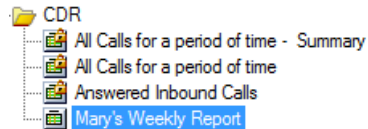
3. Either click on the **FILE/RENAME** menu, or right-click on the template's name and from the contextual menu click on **RENAME**, or else press **F2**.



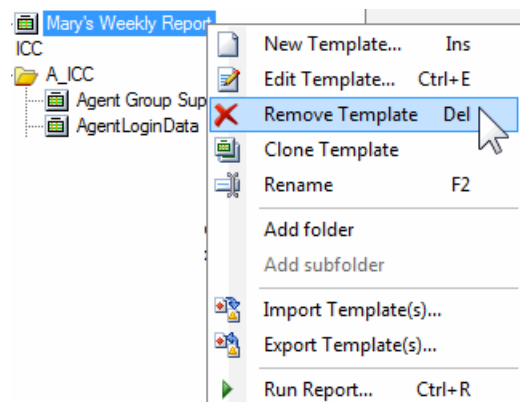
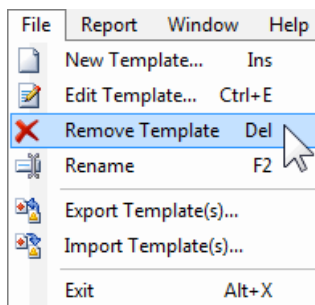
4. Enter the name of the new template and press **ENTER**.

## 7 Deleting a Report Template

1. Start MXreport.
2. In the tabbed **REPORT MANAGER** window, select the report template by clicking on the template name.



3. Either click on the **File/Remove Template** menu, or right-click on the report's name and from the contextual menu click on **Remove Template**, or click on the toolbar icon **Remove Selected Template**, OR press **DEL**.



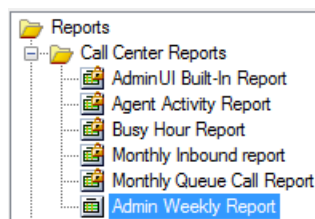
4. Confirm deletion.

## 8 Exporting/Importing a Report Template

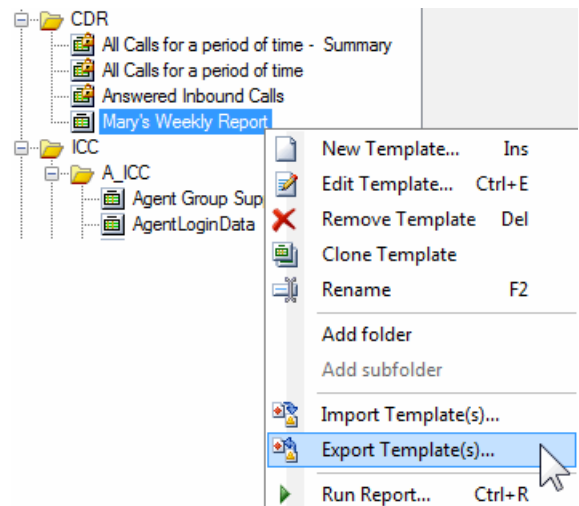
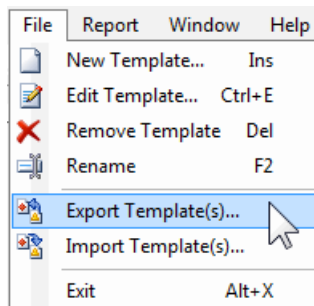
### 8.1 Exporting a Template

Templates can be shared with other MXreport users or they can be archived.

1. Start MXreport.
2. In the tabbed **REPORT MANAGER** window, select one or more report templates by clicking on the reports' names while holding down the **CTL** key.



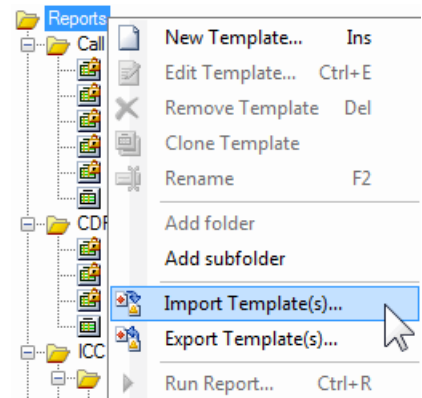
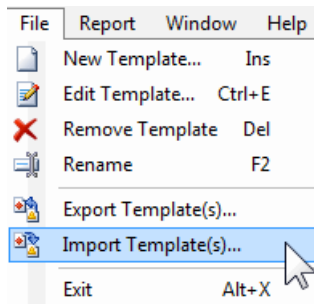
3. Either click on the **FILE/EXPORT TEMPLATE(S)** menu, or right-click on template name and from the contextual menu click on **EXPORT TEMPLATE(S)**.



4. Choose the export directory and enter a file name.
5. MXreport saves the report templates in the .MXRP format.

## 8.2 Importing a Template

1. Start MXreport.
2. Either click on the **FILE/IMPORT TEMPLATE(S)** menu, or right-click on **REPORTS** header and from the contextual menu click on **IMPORT TEMPLATE(S)**.



3. Select the .MXRP template(s) and click **Open**.

## 9 Editing/Cloning an Existing Report Template

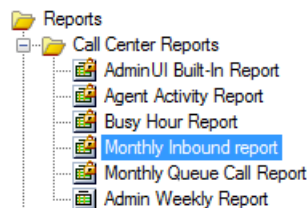
MXreport comes with preformatted CDR and Call Center/Call Group Report templates. **These templates cannot be edited directly and are indicated by the lock icon next to their name:**



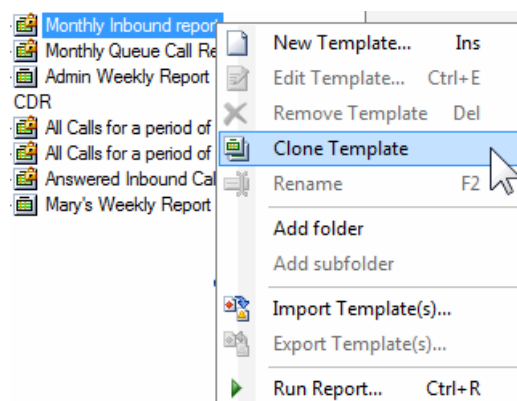
For locked templates, the *Edit Template* option is disabled and displays as gray in the toolbar.

An easy way to create a new report template from a locked report template is to clone the template and then edit the clone.

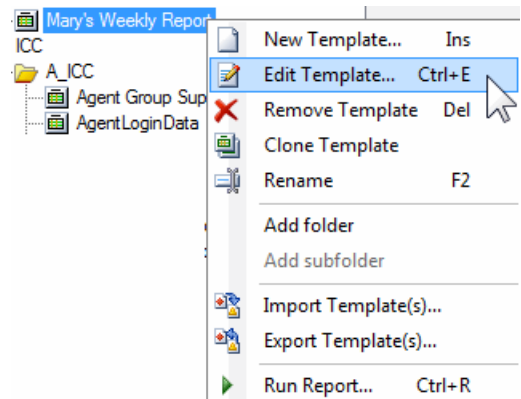
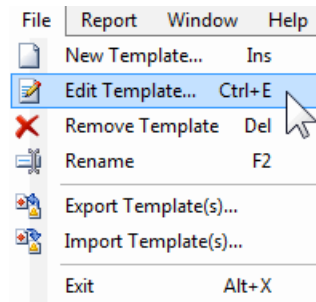
1. Start MXreport.
2. In the tabbed **REPORT MANAGER** window, select the report template by clicking on the template's name.



3. If you are editing an existing user template (not locked), go to Step 7.
4. Right-click on the template's name and select **CLONE TEMPLATE**.



5. Enter the name of the new template and press ENTER.
6. In the tabbed **REPORT MANAGER** window, select the cloned report template by clicking on the cloned template's name.
7. Click on the **FILE/EDIT TEMPLATE** menus, or right-click on template name and from the contextual menu click on **EDIT TEMPLATE**, or click on the toolbar icon **EDIT TEMPLATE**, or else press CTL-E.

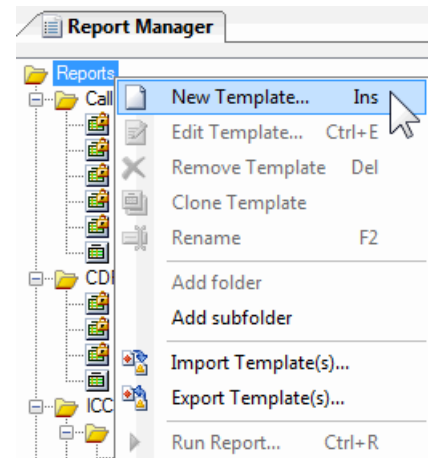
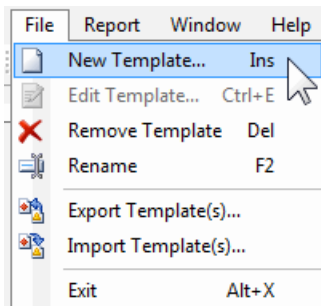


8. A tabbed **EDIT:** window opens.
9. Go to **Section 11, Using MXreport's Advanced Editor**.

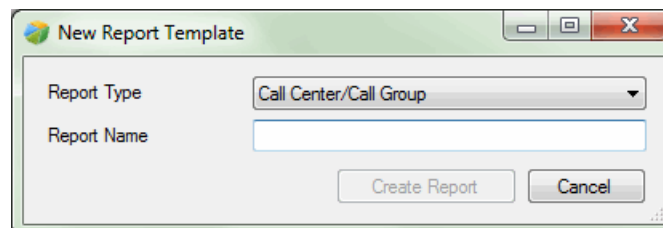
## 10 Creating a New Report Template

An easy way to create a new report template is to clone an existing template and edit the clone (See **Editing an Existing Report Template**, Section 9). To create a completely new template:

1. Start MXreport.
2. Click on **FILE/NEW TEMPLATE** menu, or in the tabbed **REPORT MANAGER** window's header right-click **REPORTS** and select **NEW TEMPLATE ...**, or click on the toolbar icon **NEW TEMPLATE** or else press INS.

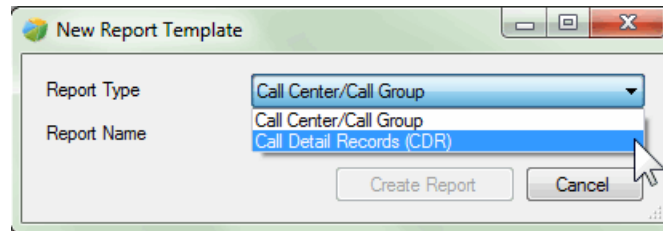


3. A **New Report Template** window opens.

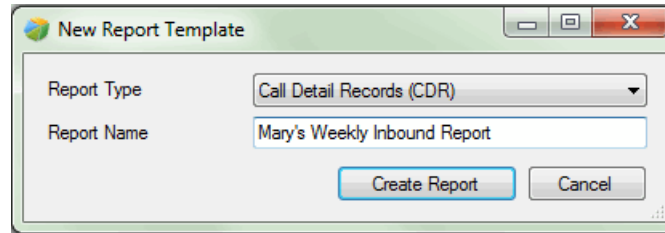




4. Click on the drop-down icon and select the report type: CDR or Call Groups & Contact Center.

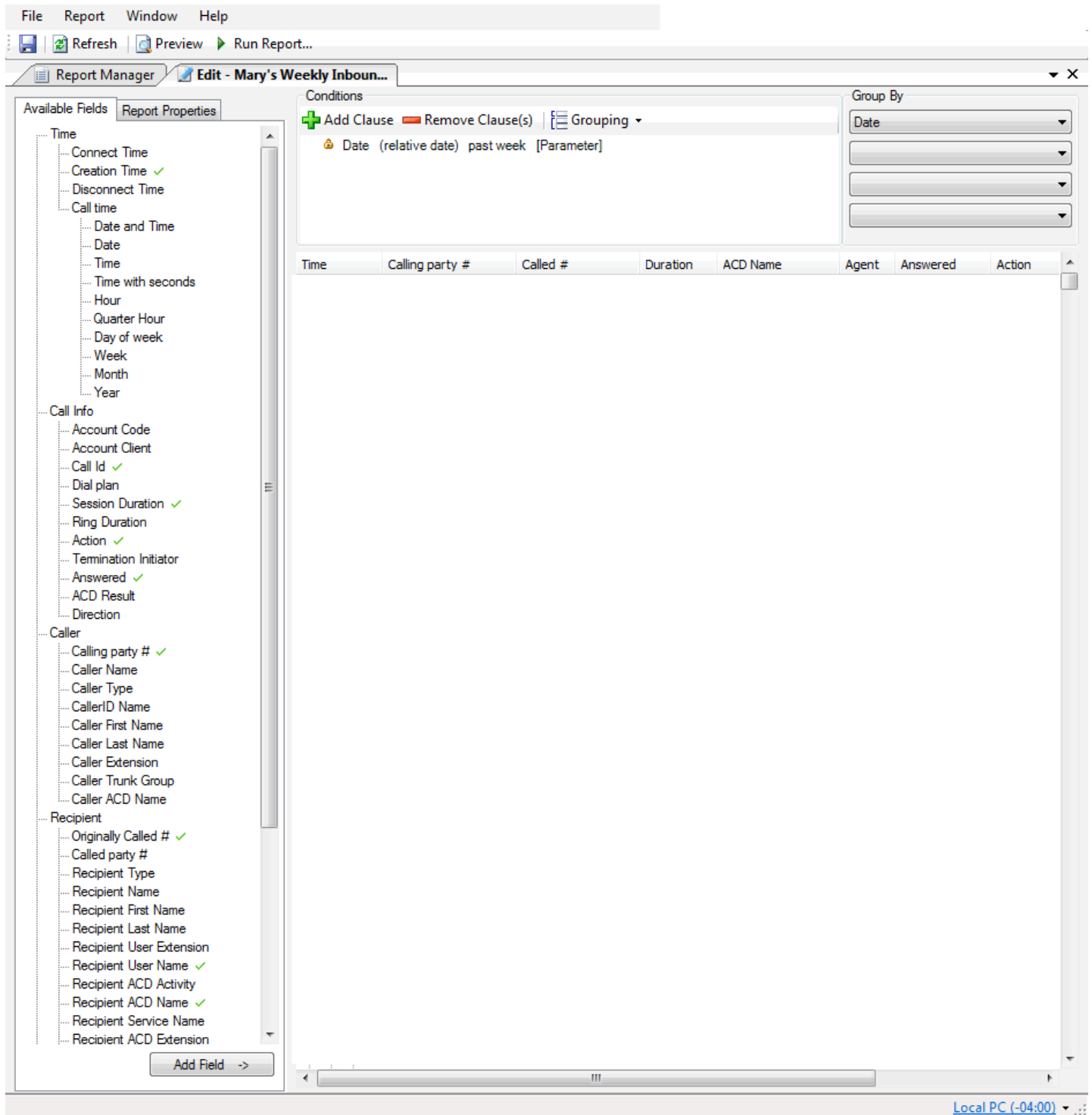


5. Enter the Report Name.



6. Click on **Create Report**.

7. A tabbed **EDIT**: window opens using a new report system template.



File Report Window Help

Refresh Preview Run Report...

Report Manager Edit - Mary's Weekly Inbound...

Available Fields Report Properties

Time

- Connect Time
- Creation Time ✓
- Disconnect Time
- Call time
  - Date and Time
  - Date
  - Time
  - Time with seconds
  - Hour
  - Quarter Hour
  - Day of week
  - Week
  - Month
  - Year

Call Info

- Account Code
- Account Client
- Call Id ✓
- Dial plan
- Session Duration ✓
- Ring Duration
- Action ✓
- Termination Initiator
- Answered ✓
- ACD Result
- Direction

Caller

- Calling party # ✓
- Caller Name
- Caller Type
- CallerID Name
- Caller First Name
- Caller Last Name
- Caller Extension
- Caller Trunk Group
- Caller ACD Name

Recipient

- Originally Called # ✓
- Called party #
- Recipient Type
- Recipient Name
- Recipient First Name
- Recipient Last Name
- Recipient User Extension
- Recipient User Name ✓
- Recipient ACD Activity
- Recipient ACD Name ✓
- Recipient Service Name
- Recipient ACD Extension

Add Field ->

Conditions

+ Add Clause - Remove Clause(s) Grouping

Date (relative date) past week [Parameter]

Group By

Date

Time	Calling party #	Called #	Duration	ACD Name	Agent	Answered	Action
------	-----------------	----------	----------	----------	-------	----------	--------

Local PC (-04:00)

8. The new report displays MXreport's default Conditions, Group By selection and column headings, and loads live data based on these values.
9. Go to **Section 11, Using MXreport's Advanced Editor**, to customize this report template.

## 11 Using MXreport's Advanced Editor

### 11.1 MXreport's Editor Layout

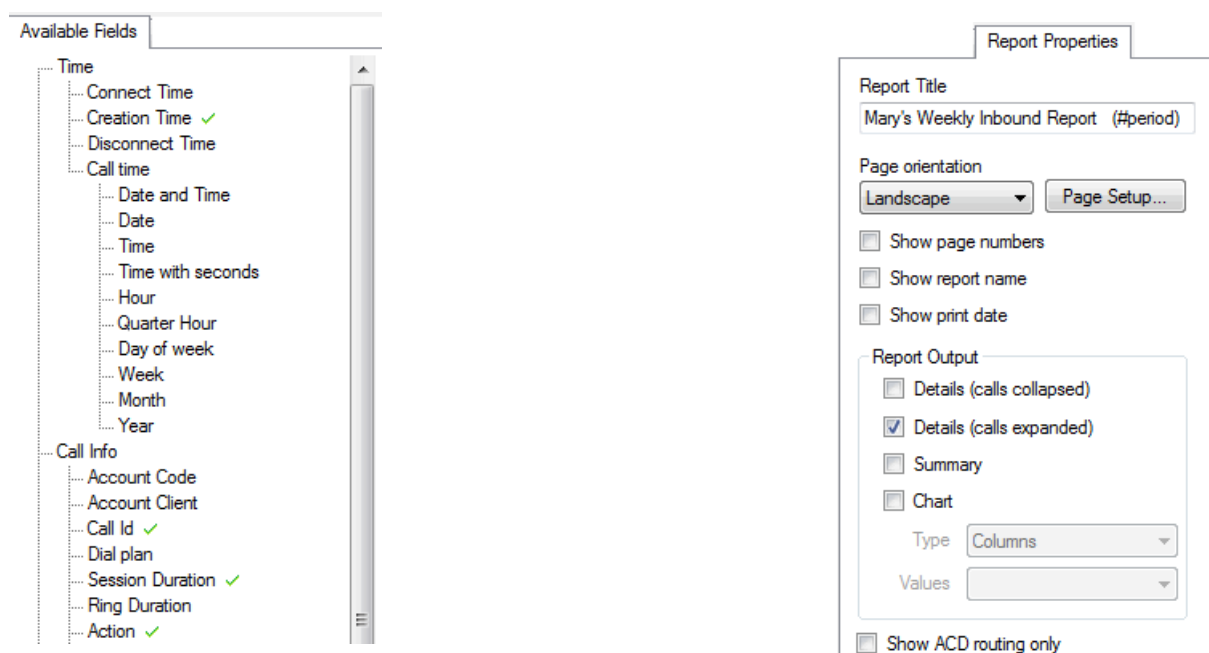
When in Edit mode, a tabbed **EDIT** window appears. When editing a report template, the tool-bar icons at the top of the MXreport window change to reflect editing functions.

There are four panes within this window.

The left pane has two tabs: **AVAILABLE FIELDS** and **REPORT PROPERTIES**.

**AVAILABLE FIELDS** lists all the data fields that are available from the CDR database.

**REPORT PROPERTIES** indicates the report's title and other report printing parameters.



The screenshot shows the MXreport Advanced Editor interface. On the left, the 'Available Fields' pane is active, displaying a tree structure of fields. On the right, the 'Report Properties' pane is active, showing configuration options for the report.

**Available Fields:**

- Time
  - Connect Time
  - Creation Time ✓
  - Disconnect Time
  - Call time
    - Date and Time
    - Date
    - Time
    - Time with seconds
    - Hour
    - Quarter Hour
    - Day of week
    - Week
    - Month
    - Year
- Call Info
  - Account Code
  - Account Client
  - Call Id ✓
  - Dial plan
  - Session Duration ✓
  - Ring Duration
  - Action ✓

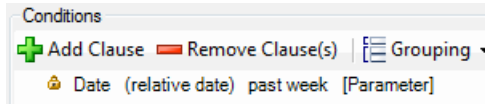
**Report Properties:**

- Report Title: Mary's Weekly Inbound Report (#period)
- Page orientation: Landscape (dropdown menu) [Page Setup...]
- ☐ Show page numbers
- ☐ Show report name
- ☐ Show print date
- Report Output
  - ☐ Details (calls collapsed)
  - ☒ Details (calls expanded)
  - ☐ Summary
  - ☐ Chart
    - Type: Columns (dropdown menu)
    - Values: (dropdown menu)
- ☐ Show ACD routing only

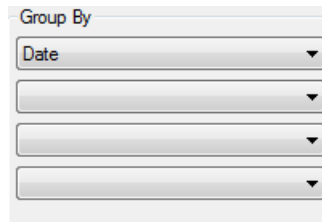
The bottom pane displays the report's current headings in a header bar and by their position, the order in which the data displays in the report.

Time	Calling party #	Called #	Duration	ACD Name	Agent	Answered	Action
------	-----------------	----------	----------	----------	-------	----------	--------

The top pane indicates the **CONDITIONS** or the selection criteria to use to filter the data. It has its own editing tool bar at the top of the pane (Add Clause, Remove Clause(s), etc).



The right pane lets you choose up to four group breaks when the report is printed.



**NOTE:** The height and width of these editing panes can be changed by dragging their borders.

## 11.2 Data Available for the CDR and Call Center/Call Group Reports

### 11.2.1 CDR Report Data Fields

1. Under the **AVAILABLE FIELDS** tab in the left panel, the list of available CDR data fields is divided into five logical groupings:
  - Time
  - Call Info
  - Caller
  - Recipient
  - Call Attached Data

See **Appendix B - CDR Report Fields** for complete descriptions of the data stored in these fields.

2. Fields that are *currently being used* in the report have a checkmark ✓ next to the field name.
3. Click **Run Report...** to see the report populated with actual data using the conditions specified.

### 11.2.2 Call Center/Call Group Report Fields

1. Under the **AVAILABLE FIELDS** tab in the left panel, the list of available Call Center/Call Group data fields is divided into two logical groupings:

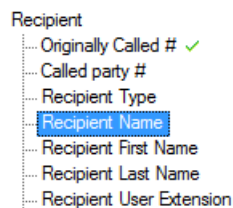
- General
- Presence

Whenever a field is selected, an information pop-up window displays at the bottom of the pane to provide information about that field. For a more complete description of the data stored in these fields, see **Appendix C - Call Center/Call Group Report Fields**.

2. Fields that are *currently being used* in the report have a checkmark ✓ next to the field name. A field can have multiple checkmarks if it is used multiple times, for example, to report both a numerical value and a percentage value in the report.
3. Click **Run Report...** to see the report populated with actual data.

### 11.2.3 Adding a Data Column to a Report

1. To add a data column to a report layout, click on the field's name under the **AVAILABLE FIELDS** tab.



Recipient

- ... Originally Called # ✓
- ... Called party #
- ... Recipient Type
- ... Recipient Name
- ... Recipient First Name
- ... Recipient Last Name
- ... Recipient User Extension

2. Drag the field to a position in the report's header bar.
3. Alternatively, either double-click on the field's name or click the Add Field -> button at the bottom of the pane. The new field will be added at the end of the report's header bar.

4. To reposition this added column or any other column drag its heading to a different position.
5. Whenever the format of the report is changed, a pop-up window prompts for a report refresh to regenerate the data.

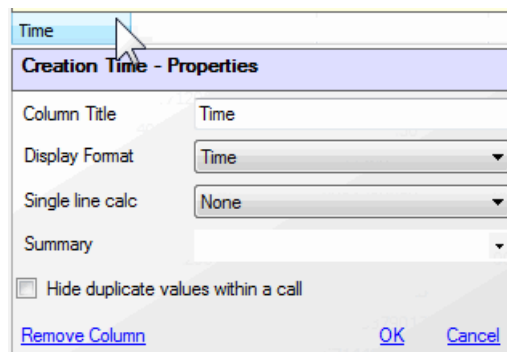


6. A new checkmark ✓ has been added next to the field name under the **AVAILABLE FIELDS** tab indicating that this field is being used in the report.

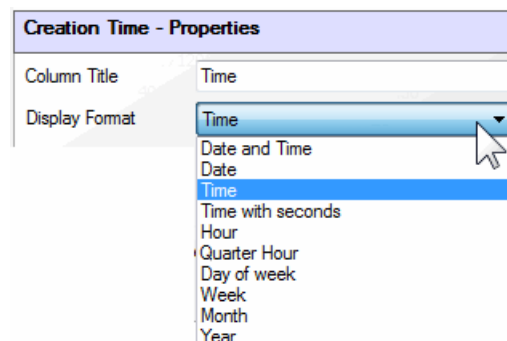
..... Recipient Name ✓

#### 11.2.4 Modifying a Data Column's Parameters

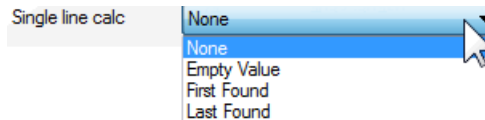
1. Position mouse over a data column heading, such as the *Time* heading in this CDR report and pause. A drop-down menu appears.



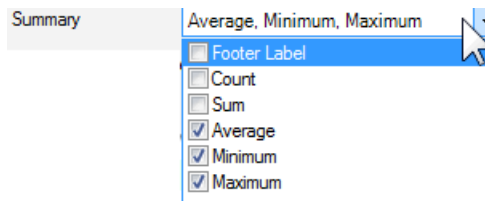
2. To change the column title, enter the new title.
3. To change the display format, if that option is available, select from the drop-down menu of choices.



- For a Single line calculation, select from the drop-down choices available.



- To report summary values for the reporting period, click on the checkboxes next to the available choices.



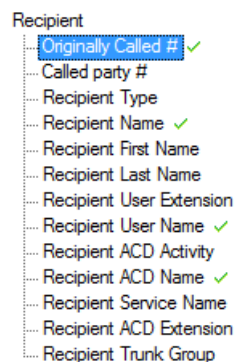
- To hide duplicate values in a call, click the checkbox.
- Click on the toolbar icon **Refresh** to update the report display.



### 11.2.5 Removing a Data Column from the Report

There are two ways to remove a column from a report:

- In the **Available Fields** pane, double-click on the name of the field being removed.

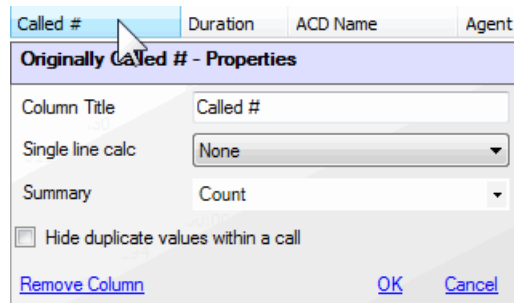


- The checkbox ✓ next to that name disappears and that column is removed from the report.



or

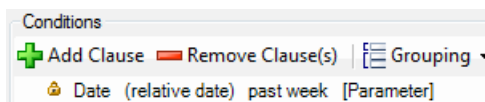
1. Position mouse over column heading in the lower pane's header bar and pause.



2. Select **Remove Column** from the pop-up window.
3. Note that the checkbox ☒ no longer is displayed next to the field name under the **Available Fields** tab indicating that this field is not being used in the report.

### 11.3 Conditions

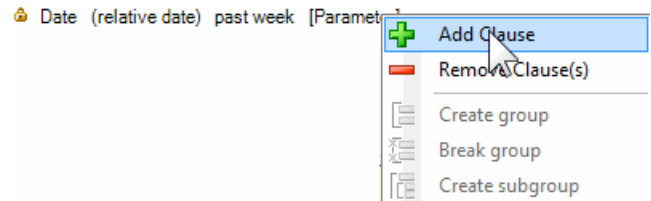
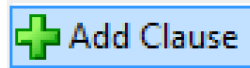
The top pane indicates the **CONDITIONS** or the selection criteria that you wish to use to filter the data for the report. It has its own editing tool bar at the top of this pane (Add Clause, Remove Clause, etc.)



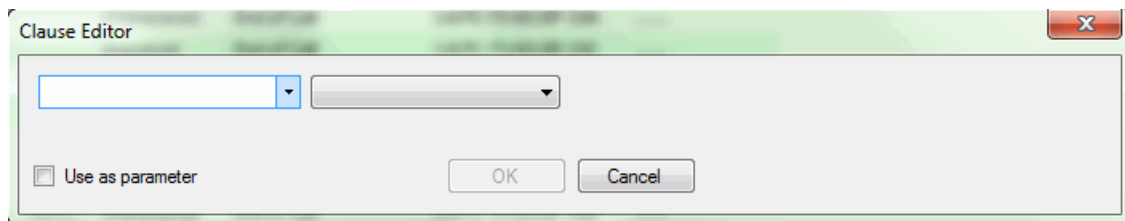
The selection criteria are built by adding conditional clauses while using the data fields under the **Available Fields** tab in the left panel.

### 11.3.1 Adding a Conditions Clause

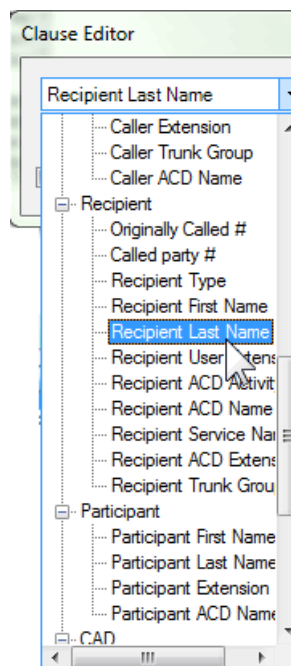
1. **CALL DATE** is a required clause and is displayed by default in the **CONDITIONS** pane.
2. Click on **ADD CLAUSE** in the **CONDITIONS** toolbar, or right-click on a Conditions Clause and choose Add Clause.



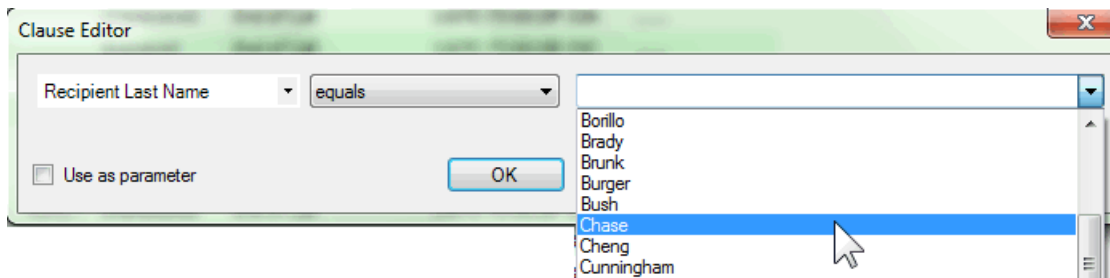
3. A pop-up **Clause Editor** window opens.



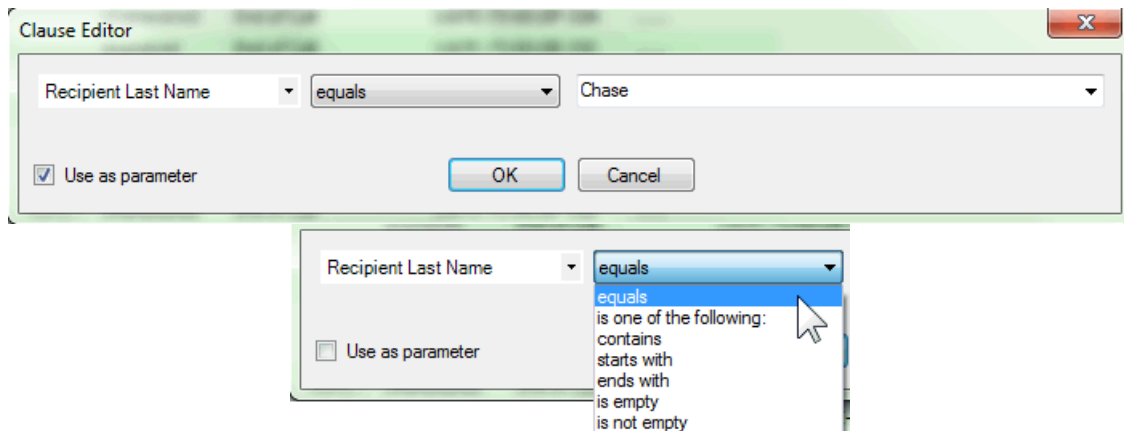
4. Click on the drop-down menu in the left entry field and select a data field.



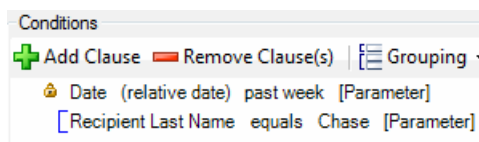
5. Click on the drop-down menu in the middle entry field and select a condition (some selections do not require this entry)
6. Click on drop-down arrow in the next field(s) and enter condition parameter(s).



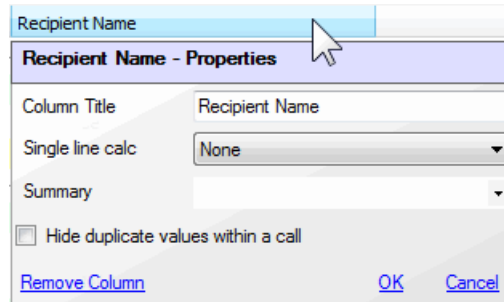
7. If you want to be able to enter a different value when the report is run, click on the checkbox next to **USE AS PARAMETER**.



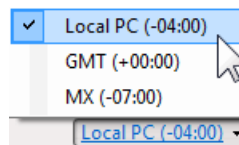
8. Press OK to accept.
9. The **CONDITIONS** pane now lists your entry and displays the data field, your logic statement and your parameter value.



10. As other Conditions clauses are added, the logical AND operator is appended to each additional clause. If you wish to use an OR operator instead, click on the AND operator and it will toggle to an OR operator and vice versa.
11. Prior to running the report, you can modify the Data Column's parameters (See Section **11.2.3 - Modifying a Data Column**)



12. On the taskbar in the lower right-hand corner select the timestamp: local, GMT or MX time.



13. When you click **Run Report...**, a pop-up Conditions window appears.
14. Enter your variable parameter values.
15. Click the **Run** button.
16. The report is generated in a new **Report:** tab window and is populated with live data.

#### Ad Hoc Inquiry (equals 4/18/2011)

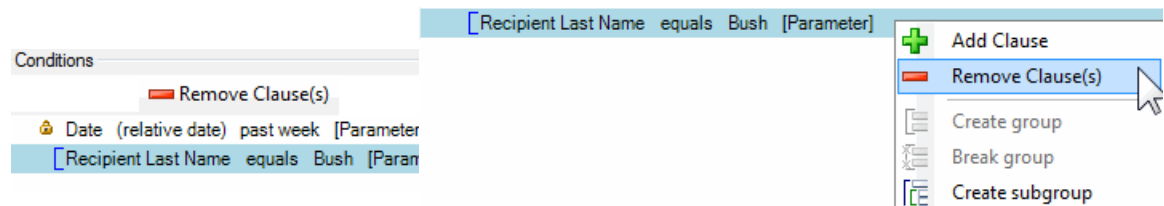
Time	Recipient Last Name	Calling party #	Called #	Duration	ACD Name	Answered	Action
<b>Call Date : 4/18/2011</b>							
10:30 AM	Bush	7345028342	4083285429	00:00:25		Answered	Transfer to VoiceMail
10:30 AM	Bush	7345028342				Unanswered	End of Call
10:30 AM	Bush	7345028342	7739070763			Unanswered	End of Call
10:30 AM	Bush	7345028342	7733830763			Unanswered	End of Call
10:31 AM	Bush	7345028342	voicemail.715.0	00:01:00		Unanswered	End of Call
10:39 AM	Bush	7345028342	4083285429	00:00:10		Answered	Merge
10:39 AM	Bush	7345028342		00:00:04		Answered	Merge
10:39 AM	Bush	7345028342	7739070763			Unanswered	End of Call
10:39 AM	Bush	7345028342	7733830763			Unanswered	End of Call
10:39 AM	Bush	7345028342		00:02:43		Answered	End of Call
11:11 AM	Bush	8322365308	4083285429	00:00:15		Answered	End of Call
11:11 AM	Bush	8322365308				Unanswered	End of Call
11:11 AM	Bush	8322365308	7739070763			Unanswered	End of Call
11:11 AM	Bush	8322365308	7733830763			Unanswered	End of Call

### 11.3.2 Modifying a Conditions Clause

1. In the **Conditions** pane, click on the condition or the parameter you are modifying.
2. The pop-up **CLAUSE EDITOR** window opens.
3. Make the change(s).
4. Click on **OK** button.

### 11.3.3 Removing a Conditions Clause

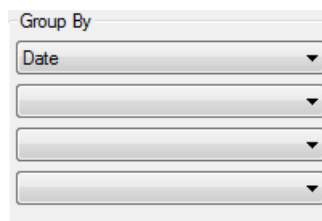
1. Click on the clause to highlight it.
2. Either click on **REMOVE CLAUSE** in the **CONDITIONS** toolbar or right-click on a Conditions Clause and choose **Remove Clause**.



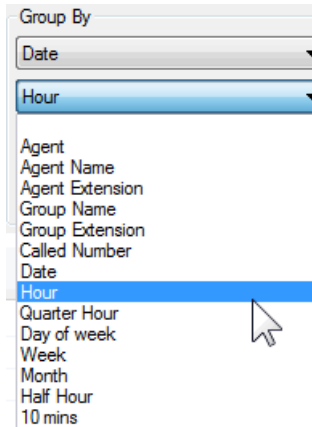
3. Confirm deletion.

### 11.4 Grouping Data

The right **GROUP BY** pane lets you sort and display the report data in groups. This pane lets you choose up to four groupings when your report is printed.



1. Suppose you are creating a weekly call count report and you want to display the data grouped first by date and within each date grouped by the hour.
2. In the **Group By** pane, use the drop-down field menus to make your selections:
3. Select **Date** for the first grouping and **Hour** for the second grouping.



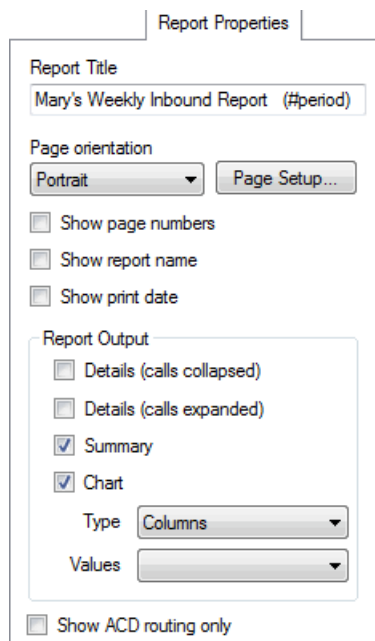
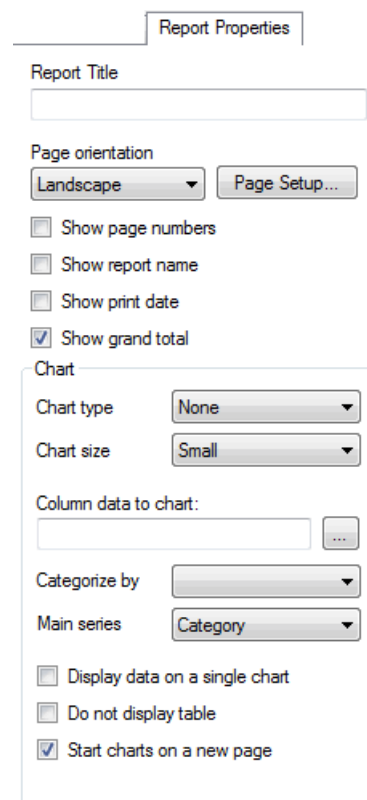
4. When you click **Run Report...**, it appears as below.

## Mary's Weekly Call Count Report (4/17/2011 - 4/23/2011)

	<i>Call Count</i>		
	<i>In</i>	<i>Out</i>	<i>Total</i>
<b>Grand Total</b>	263	81	344
<b>4/18/2011</b>	63	21	84
9:00 AM - 10:00 AM	1	0	1
10:00 AM - 11:00 AM	4	0	4
11:00 AM - 12:00 PM	11	1	12
12:00 PM - 1:00 PM	10	1	11
1:00 PM - 2:00 PM	9	8	17
2:00 PM - 3:00 PM	6	1	7
3:00 PM - 4:00 PM	10	6	16
4:00 PM - 5:00 PM	5	0	5
5:00 PM - 6:00 PM	3	4	7
6:00 PM - 7:00 PM	4	0	4
<b>4/19/2011</b>	74	19	93
9:00 AM - 10:00 AM	5	0	5
10:00 AM - 11:00 AM	5	0	5
11:00 AM - 12:00 PM	4	1	5
12:00 PM - 1:00 PM	13	0	13
1:00 PM - 2:00 PM	15	3	18
2:00 PM - 3:00 PM	7	3	10
3:00 PM - 4:00 PM	9	3	12
4:00 PM - 5:00 PM	4	4	8
5:00 PM - 6:00 PM	7	1	8
6:00 PM - 7:00 PM	5	4	9
<b>4/20/2011</b>	53	12	65
9:00 AM - 10:00 AM	4	2	6
10:00 AM - 11:00 AM	4	0	4
11:00 AM - 12:00 PM	7	0	7
12:00 PM - 1:00 PM	8	2	10
1:00 PM - 2:00 PM	3	0	3
2:00 PM - 3:00 PM	5	1	6
3:00 PM - 4:00 PM	2	3	5
4:00 PM - 5:00 PM	6	4	10
5:00 PM - 6:00 PM	7	0	7
6:00 PM - 7:00 PM	7	0	7

## 11.5 Report Print Parameters

1. In the left pane, click on the **REPORT PROPERTIES** tab.
2. This panel enables you to enter such report properties as the report's title, page orientation, page numbering, detail reporting or summarization, charting etc.
3. The left image is the report properties panel shown for printing a CDR report. The Right image is the report properties panel shown for printing a CALL CENTER/CALL GROUP report.

4. In specifying the report title, you can use variable parameters enclosed in parentheses:
  - (#period) Period that User Specifies in the Call Date Condition
  - (#name) Name of the Report Template Being Used
  - (#user) Name of the Person Running Report
  - (#time) Date and Time Report Was Generated
5. *Page Setup* provides the specifications for paper size, source and margins.



6. If *Show ACD routing only* box is checked, MXreport only will report those segments of a call that were connected to an ACD group. It will not, for example, report on a segment that connected to an auto-attendant.
7. Checkmark the other report parameters, as applicable.

## **11.6 Charting**

### **11.6.1 MXreport's Charting Features**

In the **Report Properties** tab, the report output also can be printed as a chart.

MXreport has eight built-in chart types:

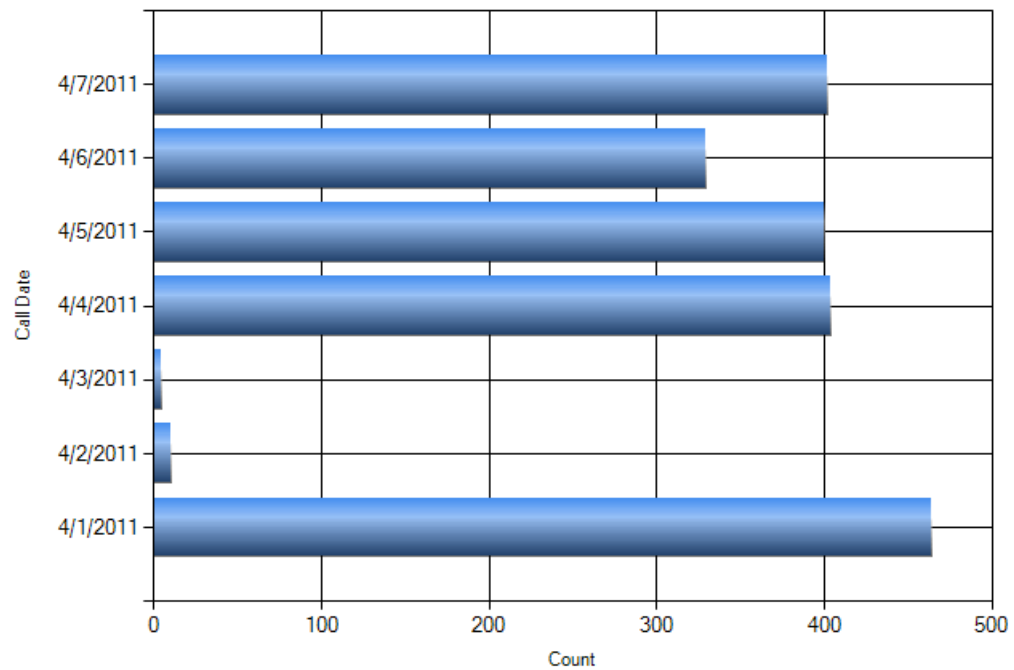
- Bar
- Stacked Bar
- 100% Stacked Bar
- Column
- Stacked Column
- 100% Stacked Column
- Line
- Pie

For a CDR report, the chart parameters are: ***type*** and ***values***.

Here are several examples of a weekly call count CDR report using various chart types:

## Mary's Weekly Inbound Report - Bar (between 4/1/2011 and 4/7/2011)

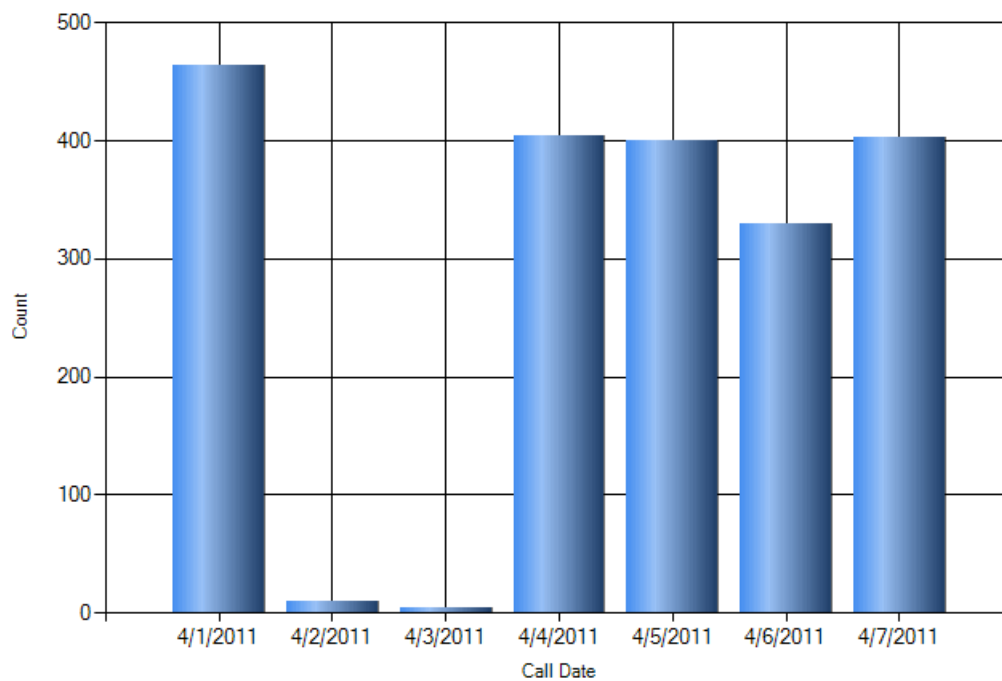
	Count
4/1/2011	464
4/2/2011	10
4/3/2011	4
4/4/2011	404
4/5/2011	400
4/6/2011	329
4/7/2011	402
2013	



## Mary's Weekly Inbound Report - Columns (between 4/1/2011 and 4/7/2011)

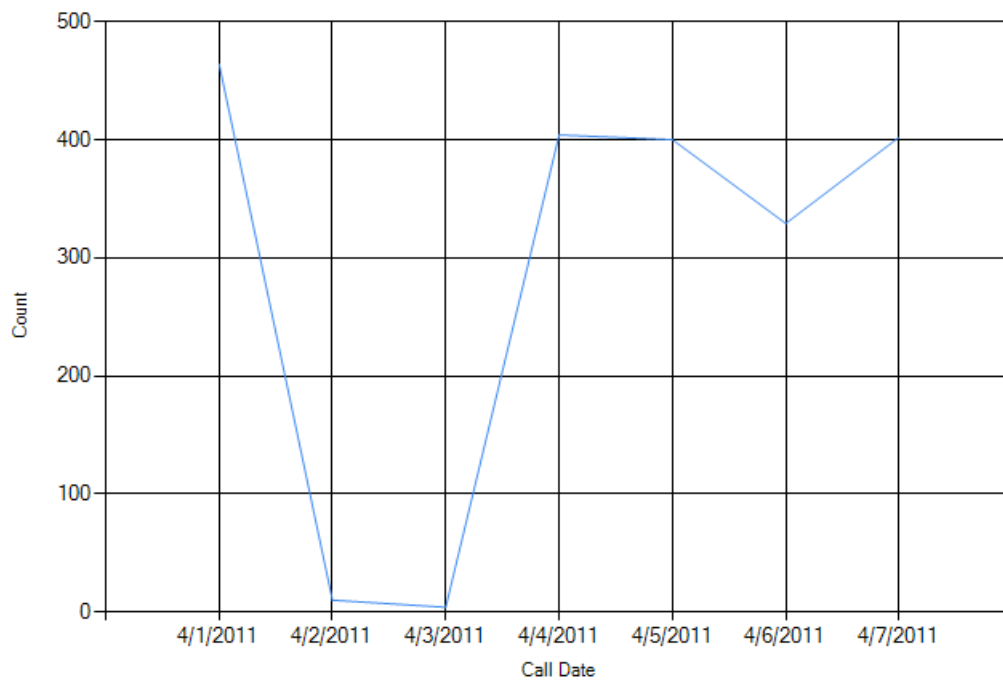
	<i>Count</i>
4/1/2011	464
4/2/2011	10
4/3/2011	4
4/4/2011	404
4/5/2011	400
4/6/2011	329
4/7/2011	402

2013



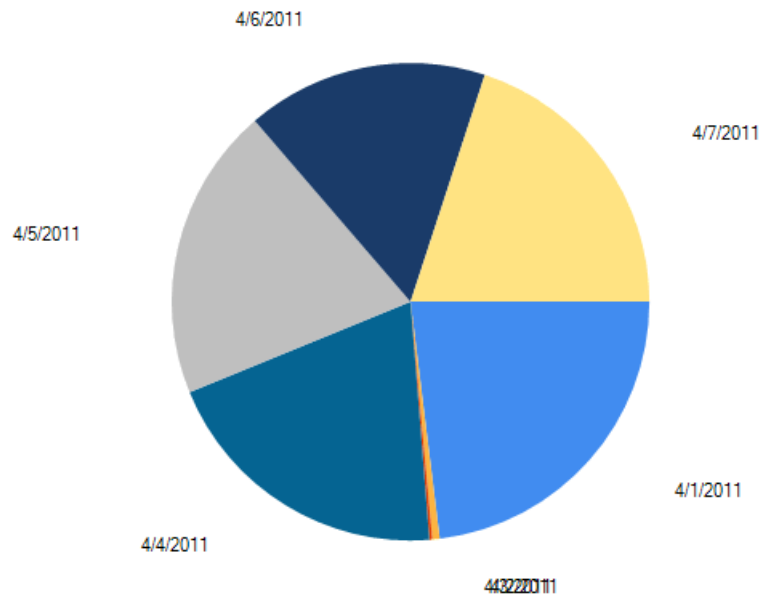
## Mary's Weekly Inbound Report - Line (between 4/1/2011 and 4/7/2011)

	Count
4/1/2011	464
4/2/2011	10
4/3/2011	4
4/4/2011	404
4/5/2011	400
4/6/2011	329
4/7/2011	402
2013	



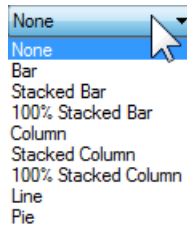
## Mary's Weekly Inbound Report - Pie (between 4/1/2011 and 4/7/2011)

	Count
4/1/2011	464
4/2/2011	10
4/3/2011	4
4/4/2011	404
4/5/2011	400
4/6/2011	329
4/7/2011	402
2013	



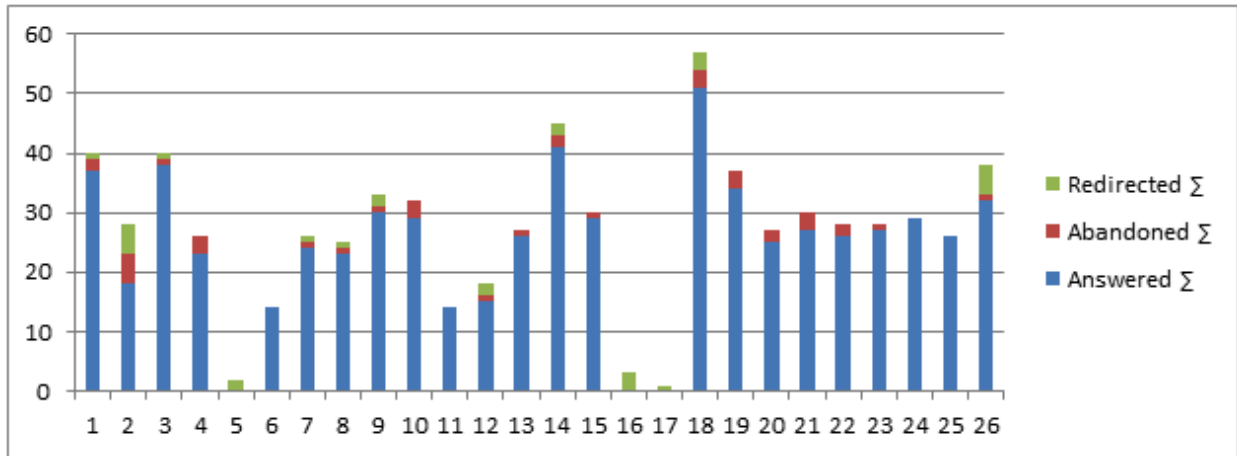
For a Call Center/Call Group report, there are eight chart parameters. To include a chart in a Call Center/Call Group report:

1. Select **Chart type**.



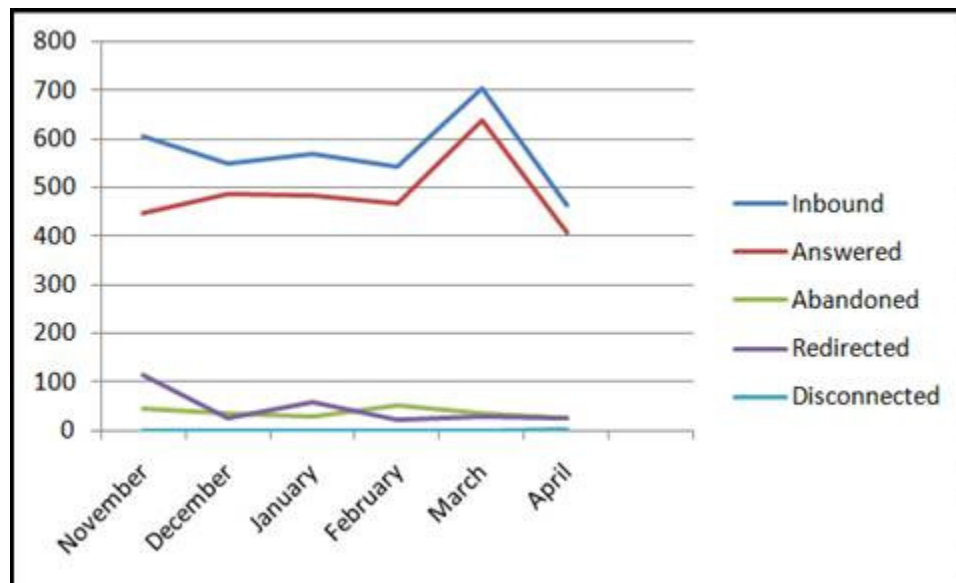
2. **Chart size** – Select size of charts to be included in printed report: small, medium or large.
3. **Column data to chart** - Select one or more columns of data from the report to display on chart(s).
4. **Categorize by** - Select category by which charted data will be grouped. Available options are determined by the *Group By* settings for the report.
5. **Main series** - Set main series for chart as *Category* or *Column data*. *Category* plots data based on the parameter selected for *Categorize by* and is equivalent to the rows of the table data. *Column data* plots data based on the table columns. For Line Charts the *Main series* always is *Category*.
6. **Display data on a single chart** - Allows data of a similar structure to be plotted on a single chart. For example the data columns for Calls in, Calls out and Calls total may be plotted on a single line, column or bar chart.
7. **Do not display table** – Does not show table data on printed report.
8. **Start charts on a new page** – Inserts a page break between the table data and charts in printed report

Here is an example of a stacked bar chart used in a monthly inbound calls Call Center/Call Group report:



### 11.6.2 Charting Using Microsoft Excel

Additional data charts can be obtained by exporting the data to a file in the CSV format (See **Section 5 - Saving or Exporting a Report**) and then importing that file into Microsoft Excel. The following chart was obtained using Excel's built-in charting functions:



## 12 Example – Creating Call Center/Call Group Report for Call Groups

The process of creating a report, whether it is a Call Center/Call Group Report or a CDR report, is the same and is described in **Section 11 - Using MXreport's Advanced Editor**. Here is an example of the step-by-step process for creating the following new Call Center/Call Group Report for call groups.

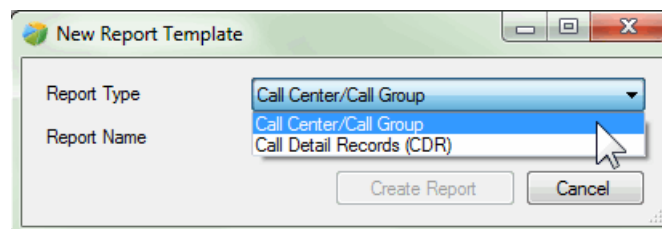
NOTE: To perform this example, an MXreport (ICC) license must be installed on the MX PBX system.

Requirements: Run an **Answering Statistics Report** for a specific call group that shows hourly data for a specific week. The report information is to show ---

- Inbound call count (numerical)
- Number of calls answered (numerical)
- Number of calls abandoned (numerical)
- Number of calls to voicemail
- Inbound call count (percentage)
- Number of calls answered (percentage)
- Number of calls abandoned (percentage)
- Number of calls to voicemail
- Talk Time
- Time to Answer (average)
- The data is to be grouped by day of week and time of day
- Include a Grand Total

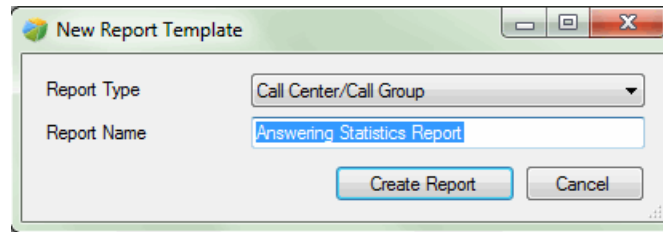
### 12.1 Creating the Sample Report Template

1. Start MXreport.
2. In the toolbar Click on **New Template...**
3. Select Report type Call Center/Call Group from drop-down menu.

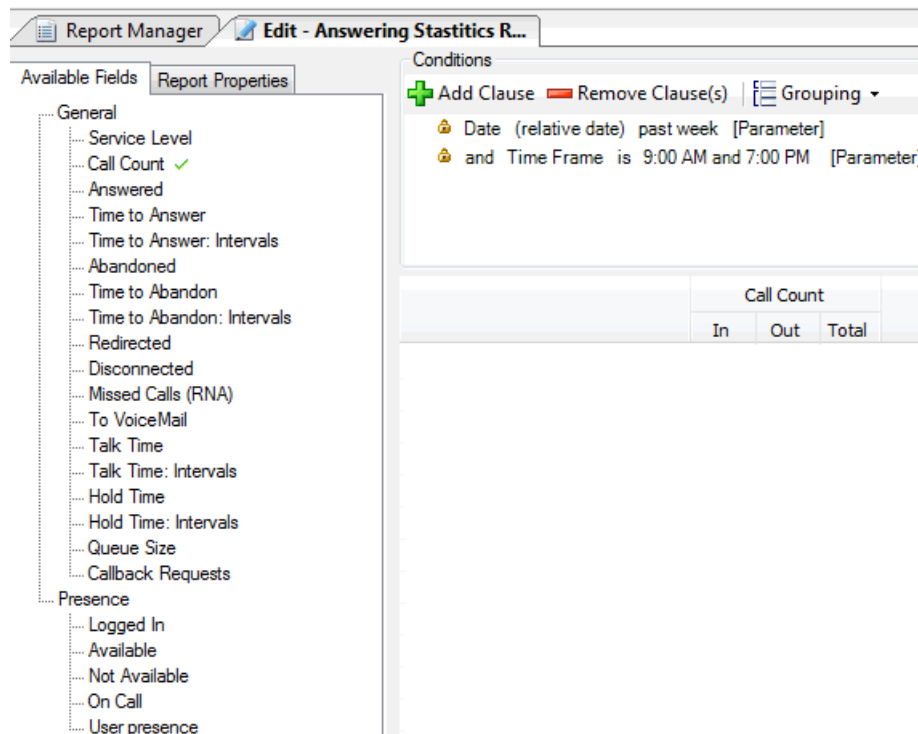




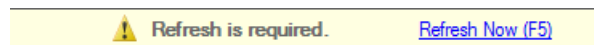
4. Report Name will be *Answering Statistics Report*.



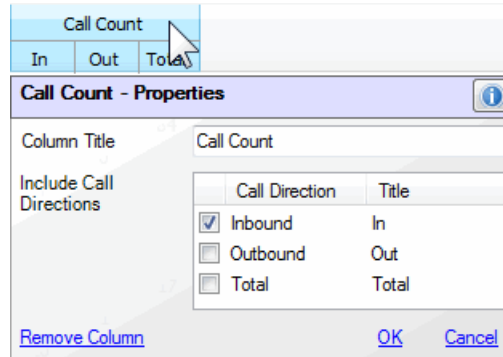
5. Click on **Create Report** button.
6. MXreport's Advanced Editor opens and loads data.



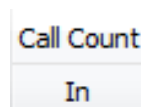
7. As changes are made to the report template, MXreport will prompt, *Refresh is required*, when changes are pending. To regenerate the report, click on **Refresh Now** or press F5.



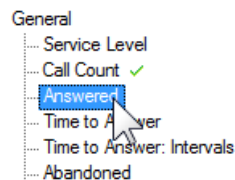
8. Position the mouse cursor on the Call Count column heading in the bottom pane and pause to display the drop-down menu. Checkmark only *Inbound* as the call direction,



9. The heading changes to --



10. Select **Answered** in Available Fields. Either double-click on the name, or drag the field to the headings bar in the bottom pane, or click on Add Field ->.

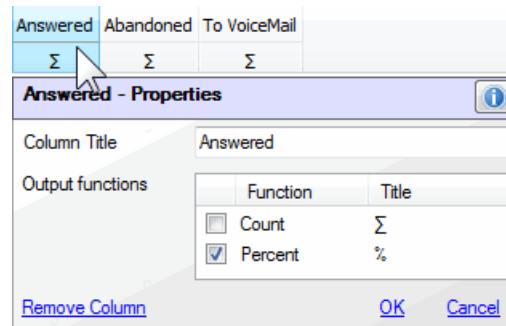


11. Select **Abandoned** in Available Fields. Add this field to the report.
12. Select **To VoiceMail** in Available Fields. Add this field to the report.
13. Again, select **Answered** in Available Fields. Add this field to the report.
14. Select **Abandoned** in Available Fields. Add this field to the report.
15. Select **To VoiceMail** in Available Fields. Add this field to the report.

16. The headings bar should appear:

Call Count	Answered	Abandoned	To VoiceMail	Answered	Abandoned	To VoiceMail
In	$\Sigma$	$\Sigma$	$\Sigma$	$\Sigma$	$\Sigma$	$\Sigma$

17. Position mouse on second **Answered** column heading and pause. Uncheck *count* and checkmark *Percent* in the drop-down window.



18. Position mouse on second **Abandoned** column heading and pause. Uncheck *count* and checkmark *Percent* in the drop-down window.

19. Position mouse on second **To VoiceMail** column heading and pause. Uncheck *count* and checkmark *Percent* in the drop-down window.

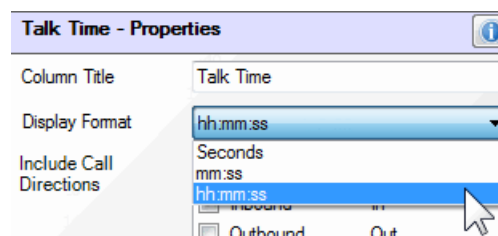
20. The headings bar should appear:

Call Count	Answered	Abandoned	To VoiceMail	Answered	Abandoned	To VoiceMail
In	$\Sigma$	$\Sigma$	$\Sigma$	%	%	%

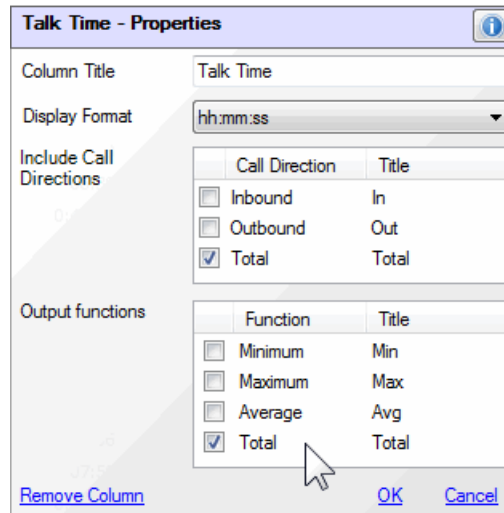
21. Select **Talk Time** in Available Fields. Add this field to the report.

22. Position mouse on **Talk Time** column heading and pause for the drop-down menu.

23. In Display Format, **select hh.mm.ss.**



24. Checkmark *Total* for both **Include Call Directions** and **Output functions**.

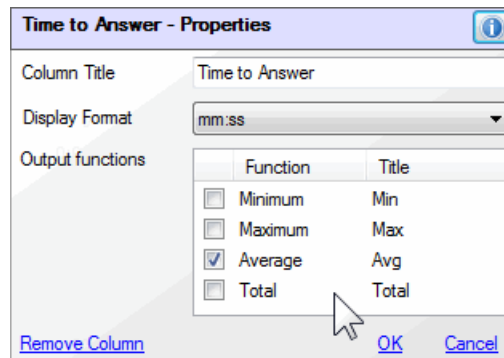


Talk Time - Properties											
Column Title	Talk Time										
Display Format	hh:mm:ss										
Include Call Directions	<table border="1"> <thead> <tr> <th>Call Direction</th> <th>Title</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Inbound</td> <td>In</td> </tr> <tr> <td><input type="checkbox"/> Outbound</td> <td>Out</td> </tr> <tr> <td><input checked="" type="checkbox"/> Total</td> <td>Total</td> </tr> </tbody> </table>	Call Direction	Title	<input type="checkbox"/> Inbound	In	<input type="checkbox"/> Outbound	Out	<input checked="" type="checkbox"/> Total	Total		
	Call Direction	Title									
	<input type="checkbox"/> Inbound	In									
<input type="checkbox"/> Outbound	Out										
<input checked="" type="checkbox"/> Total	Total										
Output functions	<table border="1"> <thead> <tr> <th>Function</th> <th>Title</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Minimum</td> <td>Min</td> </tr> <tr> <td><input type="checkbox"/> Maximum</td> <td>Max</td> </tr> <tr> <td><input type="checkbox"/> Average</td> <td>Avg</td> </tr> <tr> <td><input checked="" type="checkbox"/> Total</td> <td>Total</td> </tr> </tbody> </table>	Function	Title	<input type="checkbox"/> Minimum	Min	<input type="checkbox"/> Maximum	Max	<input type="checkbox"/> Average	Avg	<input checked="" type="checkbox"/> Total	Total
	Function	Title									
	<input type="checkbox"/> Minimum	Min									
	<input type="checkbox"/> Maximum	Max									
	<input type="checkbox"/> Average	Avg									
<input checked="" type="checkbox"/> Total	Total										
<a href="#">Remove Column</a> <a href="#">OK</a> <a href="#">Cancel</a>											

25. Select ***Time to Answer*** in Available Fields. Add this field to the report.

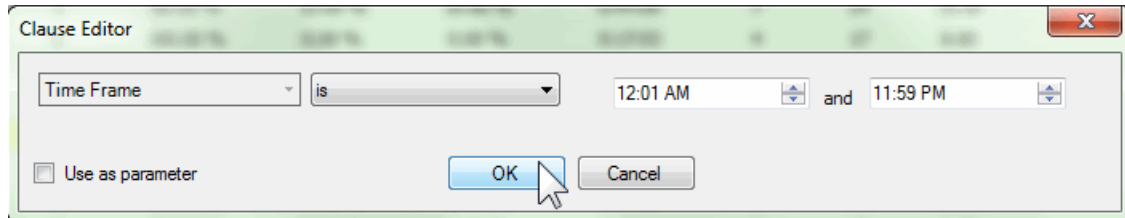
26. Position mouse on Time to Answer column heading and pause.

27. Checkmark only *Average* in the drop-down window.



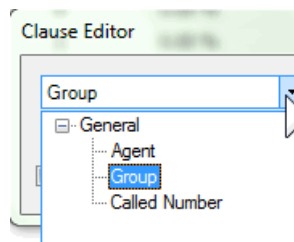
Time to Answer - Properties											
Column Title	Time to Answer										
Display Format	mm:ss										
Output functions	<table border="1"> <thead> <tr> <th>Function</th> <th>Title</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Minimum</td> <td>Min</td> </tr> <tr> <td><input type="checkbox"/> Maximum</td> <td>Max</td> </tr> <tr> <td><input checked="" type="checkbox"/> Average</td> <td>Avg</td> </tr> <tr> <td><input type="checkbox"/> Total</td> <td>Total</td> </tr> </tbody> </table>	Function	Title	<input type="checkbox"/> Minimum	Min	<input type="checkbox"/> Maximum	Max	<input checked="" type="checkbox"/> Average	Avg	<input type="checkbox"/> Total	Total
	Function	Title									
	<input type="checkbox"/> Minimum	Min									
	<input type="checkbox"/> Maximum	Max									
	<input checked="" type="checkbox"/> Average	Avg									
<input type="checkbox"/> Total	Total										
<a href="#">Remove Column</a> <a href="#">OK</a> <a href="#">Cancel</a>											

28. In the **Conditions** pane, change the Time Frame to *12:01 AM to 11:59 PM*.

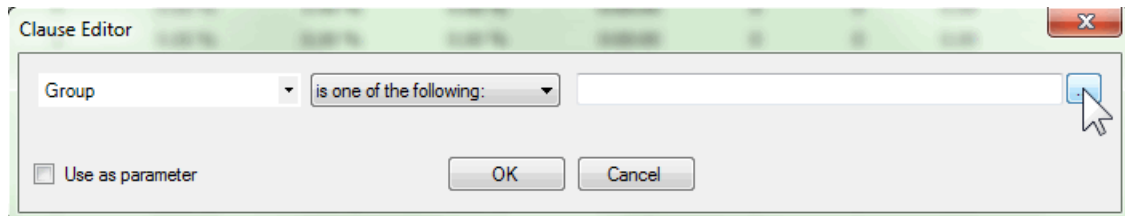


29. Click on **Add Clause** icon in the **Conditions** toolbar.

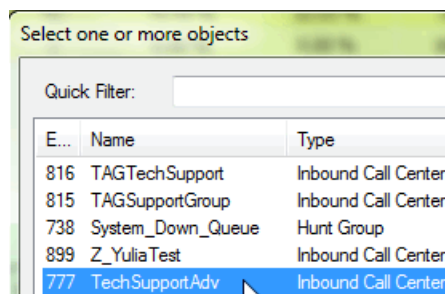
30. In the pop-up **Clause Editor** window, select *Group*.



31. Click on the lookup icon button.



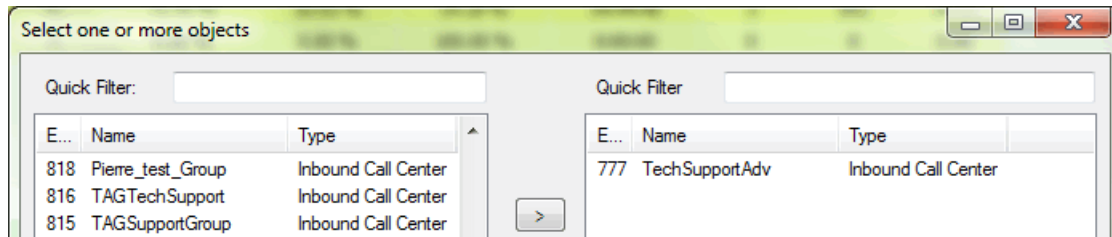
32. A list of MX call groups appears. Select a call group.



33. Either double-click on the name, or click on the add button:

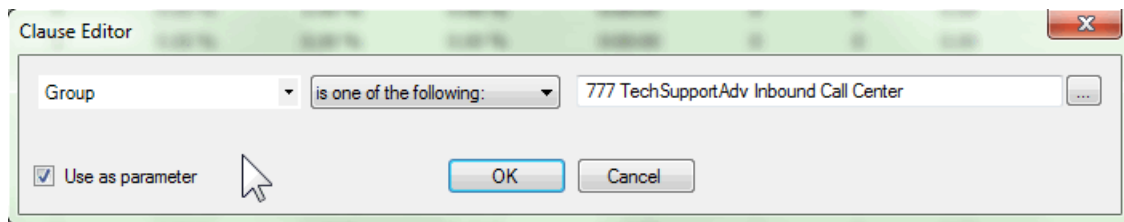


34. The group is added to the list.



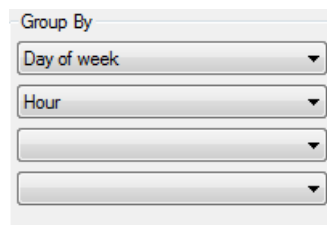
35. Click **OK** to close window.

36. To make this a variable value each time the report is run, checkmark **Use as parameter** in Clause Editor window.



37. Click **OK** to close Clause Editor.

38. Group by *Day of week* then by *Hour*

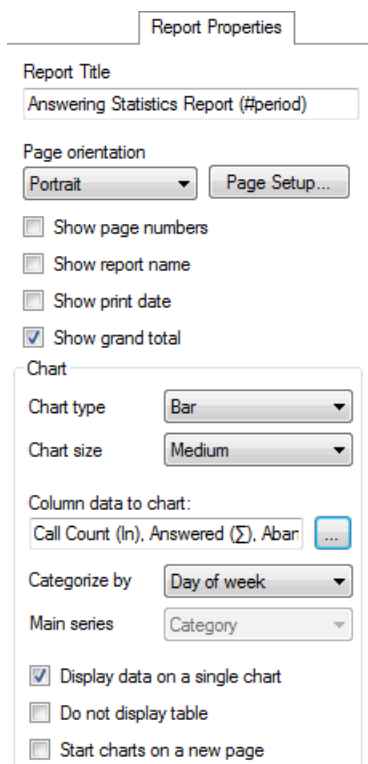


39. Your Edit window now should look like the following:

[illegible]

## 12.2 Printing the Sample Report

1. Click on **Report Properties** tab in the **Report Manager** pane.
2. Enter the report title, **Answering Statistics Report (#period)**, and checkmark *Show Grand Total*.



The screenshot shows the 'Report Properties' dialog box. The 'Report Title' field contains 'Answering Statistics Report (#period)'. The 'Page orientation' is set to 'Portrait'. The 'Show grand total' checkbox is checked. The 'Chart' section shows 'Bar' as the chart type and 'Medium' as the chart size. The 'Column data to chart' field contains 'Call Count (In), Answered (Σ), Abar'. The 'Categorize by' field is set to 'Day of week' and the 'Main series' is set to 'Category'. The 'Display data on a single chart' checkbox is checked, while 'Do not display table' and 'Start charts on a new page' are unchecked.

Report Properties

Report Title  
Answering Statistics Report (#period)

Page orientation  
Portrait Page Setup...

☐ Show page numbers  
☐ Show report name  
☐ Show print date  
☒ Show grand total

Chart  
Chart type Bar  
Chart size Medium

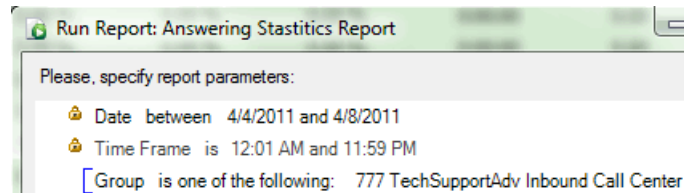
Column data to chart:  
Call Count (In), Answered (Σ), Abar

Categorize by Day of week  
Main series Category

☒ Display data on a single chart  
☐ Do not display table  
☐ Start charts on a new page



3. In the toolbar, click on **Run Report...**
4. The **Run Report** parameters window opens.
5. Enter this report's parameters.



6. Click on **Run** button.
7. An image of the report appears in a tabbed window:

**Answering Statistics Report (between 4/4/2011 and 4/8/2011)**

	Call Count	Answered	Abandoned	To VoiceMail	Answered	Abandoned	To VoiceMail	Talk Time	Time to Answer
	In	Σ	Σ	Σ	%	%	%		Avg
<b>Grand Total</b>	146	135	3	7	92.47 %	2.05 %	4.79 %	21:14:49	49.02
<b>Monday</b>	31	28	1	1	90.32 %	3.23 %	3.23 %	2:54:28	50.96
12:00 AM - 1:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
1:00 AM - 2:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
2:00 AM - 3:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
3:00 AM - 4:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
4:00 AM - 5:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
5:00 AM - 6:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
6:00 AM - 7:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
7:00 AM - 8:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
8:00 AM - 9:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
9:00 AM - 10:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
10:00 AM - 11:00 AM	1	1	0	0	100.00 %	0.00 %	0.00 %	0:03:02	6.00
11:00 AM - 12:00 PM	1	1	0	0	100.00 %	0.00 %	0.00 %	0:11:58	7.00
12:00 PM - 1:00 PM	7	6	0	1	85.71 %	0.00 %	14.29 %	0:48:13	8.50
1:00 PM - 2:00 PM	4	4	0	0	100.00 %	0.00 %	0.00 %	0:04:00	77.50
2:00 PM - 3:00 PM	6	6	0	0	100.00 %	0.00 %	0.00 %	0:41:05	67.67
3:00 PM - 4:00 PM	4	3	1	0	75.00 %	25.00 %	0.00 %	0:09:32	14.00
4:00 PM - 5:00 PM	2	1	0	0	50.00 %	0.00 %	0.00 %	0:03:06	7.00
5:00 PM - 6:00 PM	3	3	0	0	100.00 %	0.00 %	0.00 %	0:38:12	181.00
6:00 PM - 7:00 PM	2	2	0	0	100.00 %	0.00 %	0.00 %	0:06:33	24.00
7:00 PM - 8:00 PM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
8:00 PM - 9:00 PM	1	1	0	0	100.00 %	0.00 %	0.00 %	0:08:47	7.00
9:00 PM - 10:00 PM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
10:00 PM - 11:00 PM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
11:00 PM - 12:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
<b>Tuesday</b>	33	30	0	3	90.91 %	0.00 %	9.09 %	6:23:55	103.03
12:00 AM - 1:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
1:00 AM - 2:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
2:00 AM - 3:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
3:00 AM - 4:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
4:00 AM - 5:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
5:00 AM - 6:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
6:00 AM - 7:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00

8. This *Answering Statistics* report template can be saved and rerun at any time. To save, click on **File/Save** menu, or press Ctrl-S.
9. Click on the **Print** icon in the toolbar to print report.

## 13 Example – Creating a Call Center/Call Group Report for Agent

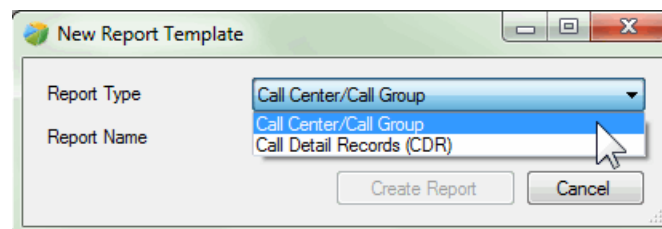
NOTE: To perform this example, an MXreport (ICC) license must be installed on the MX PBX system.

Requirements: Run an **Agent Group Support Report** that shows how agents who are assigned to multiple call groups have divided their activities during a specific time period. The report information is to be grouped by agent and is to show for each call group ---

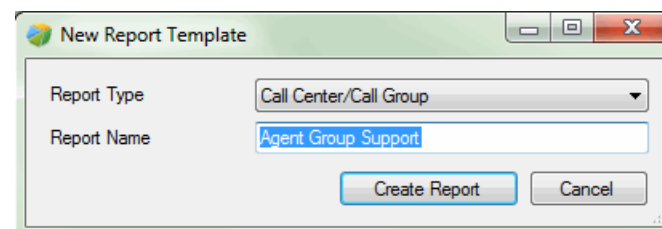
- Call count (inbound, outbound, total)
- Time logged In (numerical)
- Time Available (percentage)
- Time On Call (percentage)
- Time Unavailable (percentage)
- Talk time (minimum, maximum, average)

### 13.1 Creating the Sample Report Template

1. Start MXreport.
2. In the toolbar Click on **New Template...**
3. Select Report type Call Center/Call Group from drop-down menu.

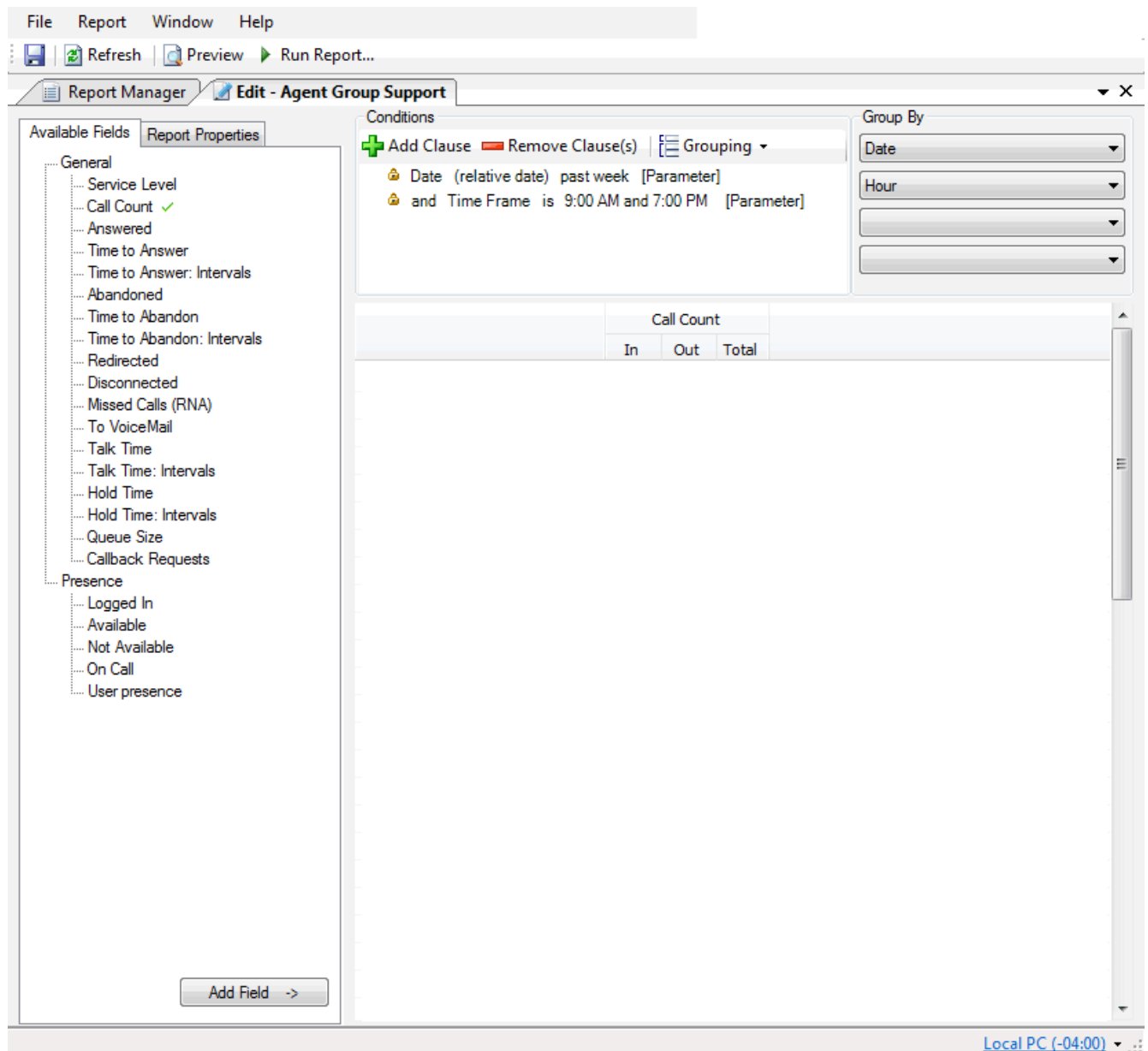


4. Report Name will be *Agent Group Support*.

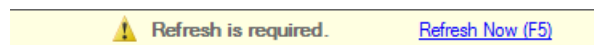


5. Click on **Create Report** button.

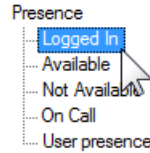
- MXreport's Advanced Editor opens and displays default values.



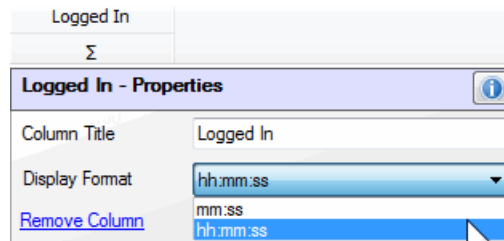
- As changes are made to the report template, MXreport will prompt, *Refresh is required*, when changes are pending. To regenerate the report, click on **Refresh Now** or press F5.



8. Select **Logged In** under the *Presence* grouping in Available Fields. Either double-click on the field name, or drag the field to the headings bar in the bottom pane, or click on Add Field ->.



9. Position mouse on **Logged In** column heading in the lower pane and pause for the drop-down menu.
10. In Display Format, **select hh.mm.ss.**



11. Select **Available** in Available Fields. Add this field to the report.
12. Select **Not Available** in Available Fields. Add this field to the report.
13. Select **On Call** in Available Fields. Add this field to the report.
14. Select **Talk Time** in Available Fields. Add this field to the report.
15. The column headings in the lower pane should appear as ---

Call Count			Logged In	Available	Not Available	On Call	Talk Time		
In	Out	Total	Σ	%	%	%	Min	Max	Avg

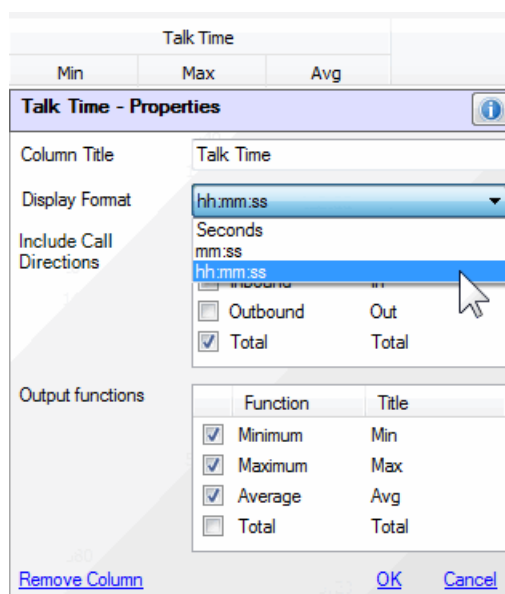
16. Position mouse on the On Call column heading and drag it to a position next to the Idle column heading.

17. The column headings in the lower pane should appear now as ---

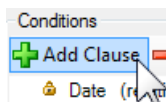
Call Count			Logged In	Available	On Call	Not Available	Talk Time		
In	Out	Total	Σ	%	%	%	Min	Max	Avg

18. Position mouse on **Talk Time** column heading and pause for the drop-down menu.

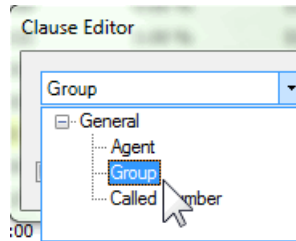
19. In Display Format, **select hh:mm:ss.**



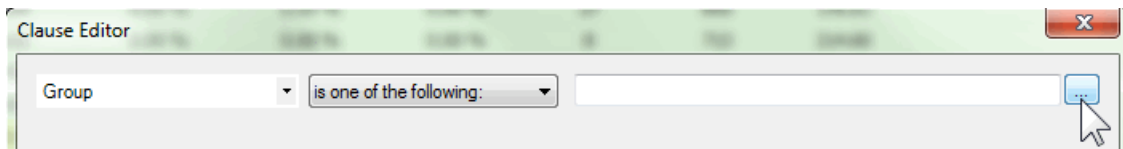
20. In the **Conditions** pane, Click on **Add Clause** icon.



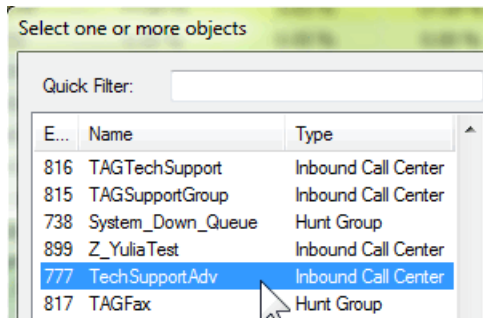
21. In the pop-up **Clause Editor** window, select *Group*.



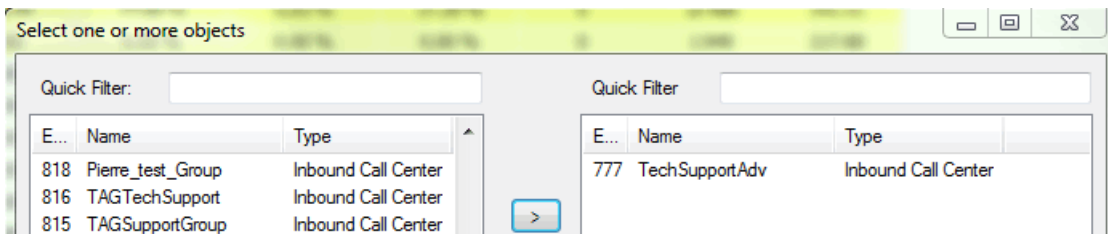
22. Click on the lookup icon button on the right.



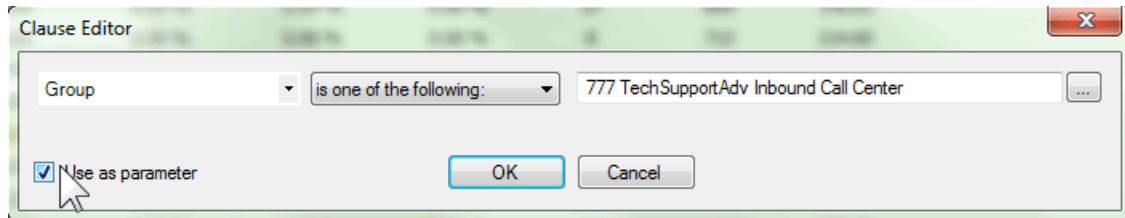
23. A list of MX call groups appears. Select a call group.



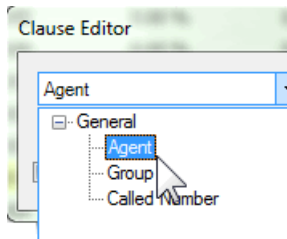
24. Either double-click on the name, or click on the add button:



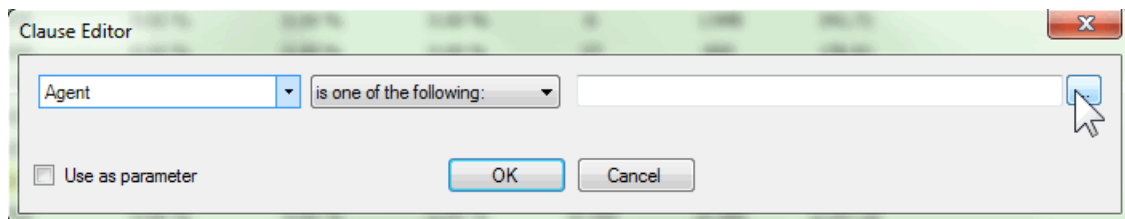
25. That group is added to list.
26. Repeat to add other groups, if desired.
27. Click **OK** to close window.
28. Checkmark **Use as parameter** in Clause Editor window to make this a variable value each time the report is run.



29. Click **OK** to close Clause Editor.
30. In the **Conditions** pane, again click on the **Add Clause** icon.
31. In the pop-up **Clause Editor** window, select *Agent*.

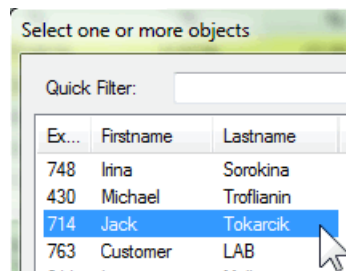


32. Click on the lookup icon button on the right.

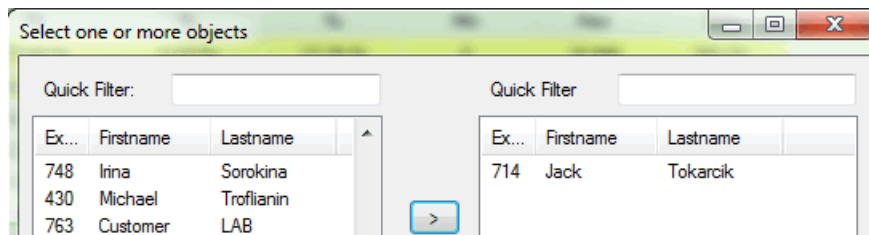




33. A list of agents appears. Select an agent.



34. Either double-click on the Name, or Click on the **Add** button:

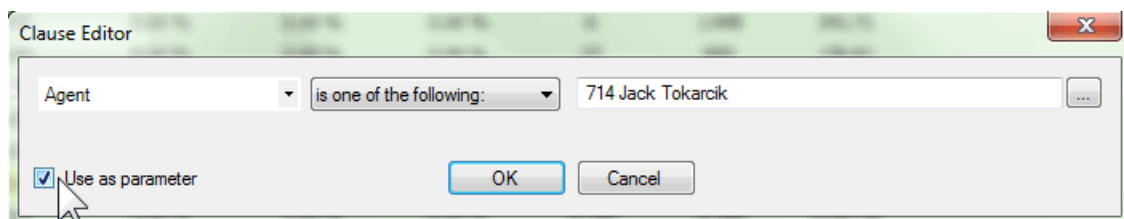


35. That agent is added to list.

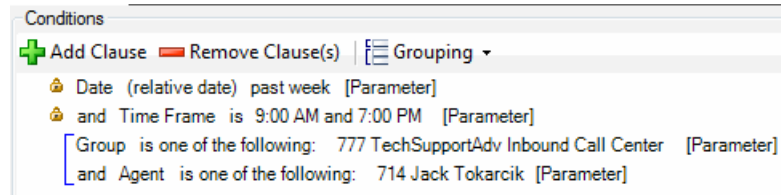
36. Repeat to add other agents, if desired.

37. Click **OK** to close window.

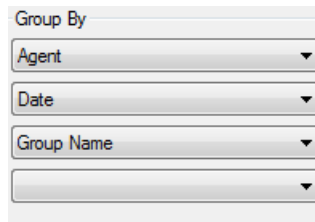
38. Checkmark *Use as parameter* in **Clause Editor** window to make this a variable value each time the report is run.



39. Click **OK** to close Clause Editor.



40. In the Group By pane, select the following groupings:



41. Your Edit window now should look like the following page with your own data parameters shown for the Groups and Agents:

File

Report

Window

Help

Refresh

Preview

Run Report...

Report Manager

Edit - Agent Group Support

Available Fields

General

Service Level

Call Count

Answered

Time to Answer

Time to Answer: Intervals

Abandoned

Time to Abandon

Time to Abandon: Intervals

Redirected

Missed Calls (RNA)

To VoiceMail

Talk Time

Talk Time: Intervals

Hold Time

Hold Time: Intervals

Queue Size

Callback Requests

Presence

Logged In

Available

Not Available

On Call

User presence

Report Properties

+

Add Clause

Remove Clause(s)

Grouping

Date (relative date)

past week

[Parameter]

and

Time Frame is 9:00 AM and 7:00 PM

[Parameter]

[Group is one of the following: 777 TechSupportAdv Inbound Call Center [Parameter]

and Agent is one of the following: 714 Jack Tokarcik [Parameter]

Conditions

+

Add Clause

Remove Clause(s)

Grouping

Group By

Agent

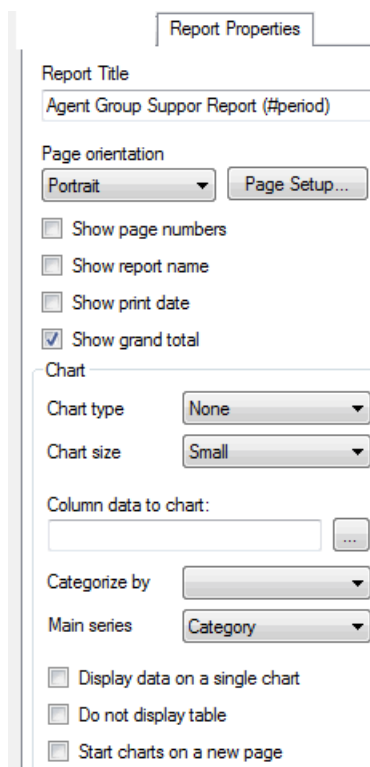
Date

Group Name

Call Count		Logged In	Available	On Call	On Break	Talk Time		
In	Out	Total	Σ	%	%	Min	Max	Avg

## 13.2 Printing the Sample Report

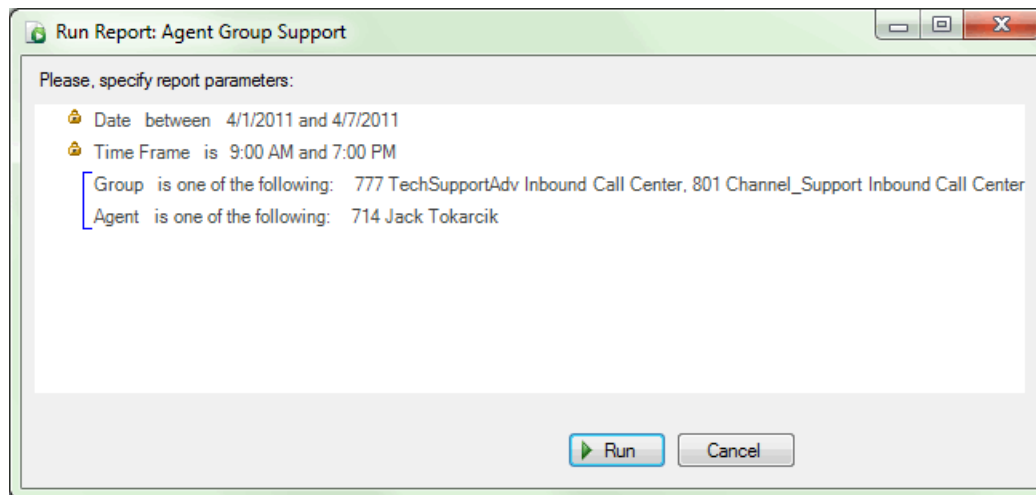
1. Click on **Report Properties** tab in the **Report Manager** pane.
2. Enter the report title, **Agent Group Support Report (#period)**, and checkmark *Show Grand Total*.



The screenshot shows the 'Report Properties' dialog box. The 'Report Title' field contains 'Agent Group Support Report (#period)'. The 'Page orientation' is set to 'Portrait'. The 'Show grand total' checkbox is checked. The 'Chart' section has 'Chart type' set to 'None' and 'Chart size' set to 'Small'. The 'Column data to chart' field is empty. The 'Categorize by' field is empty, and the 'Main series' is set to 'Category'. The 'Display data on a single chart', 'Do not display table', and 'Start charts on a new page' checkboxes are all unchecked.

3. In the toolbar, click on **Run Report...**
4. The **Run Report** parameters window opens.

- Enter this report's parameters.



Run Report: Agent Group Support

Please, specify report parameters:

📅 Date between 4/1/2011 and 4/7/2011

🕒 Time Frame is 9:00 AM and 7:00 PM

👤 Group is one of the following: 777 TechSupportAdv Inbound Call Center, 801 Channel\_Support Inbound Call Center

👤 Agent is one of the following: 714 Jack Tokarcik

- Click on Run button.
- An image of the report appears in a tabbed window.

### Agent Group Support Report (between 4/1/2011 and 4/7/2011)

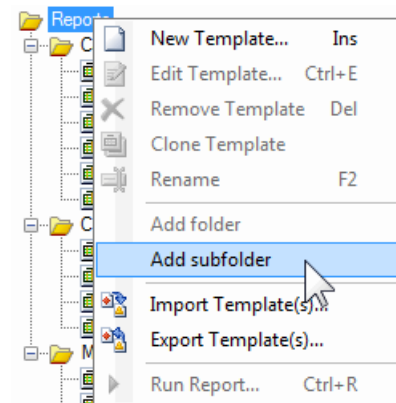
	Call Count			Logged In	Available	On Call	Not Available	Talk Time		
	In	Out	Total	Σ	%	%	%	Min	Max	Avg
<b>Grand Total</b>	8	27	35	41:20:37	91.58 %	5.90 %	2.52 %	2	3 252	256.34
<b>714 (Jack Tokarcik)</b>	8	27	35	41:20:37	91.58 %	5.90 %	2.52 %	2	3 252	256.34
<b>4/1/2011</b>	2	3	5	0:00:00	0.00 %	0.00 %	0.00 %	37	3 252	860.00
Channel_Support	1	3	4	0:00:00	0.00 %	0.00 %	0.00 %	37	3 252	889.00
TechSupportAdv	1	0	1	0:00:00	0.00 %	0.00 %	0.00 %	744	744	744.00
<b>4/2/2011</b>	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
Channel_Support	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
<b>4/3/2011</b>	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
Channel_Support	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
<b>4/4/2011</b>	4	10	14	0:00:00	0.00 %	0.00 %	0.00 %	3	603	117.43
Channel_Support	4	10	14	0:00:00	0.00 %	0.00 %	0.00 %	3	603	117.43
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
<b>4/5/2011</b>	2	10	12	0:00:00	0.00 %	0.00 %	0.00 %	2	1 189	215.17
Channel_Support	2	10	12	0:00:00	0.00 %	0.00 %	0.00 %	2	1 189	215.17
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
<b>4/6/2011</b>	0	2	2	0:00:00	0.00 %	0.00 %	0.00 %	39	91	65.00
Channel_Support	0	2	2	0:00:00	0.00 %	0.00 %	0.00 %	39	91	65.00
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
<b>4/7/2011</b>	0	2	2	41:20:37	91.58 %	5.90 %	2.52 %	55	261	158.00
Channel_Support	0	2	2	41:20:37	91.59 %	5.40 %	3.01 %	55	261	158.00
TechSupportAdv	0	0	0	10:07:37	88.14 %	2.04 %	9.81 %	0	0	0.00

8. This Agent Group Support report template can be saved and rerun at any time. To save, click on **File/Save** menu, or press Ctrl-S.
9. Click on the **Print** icon in toolbar to print report.

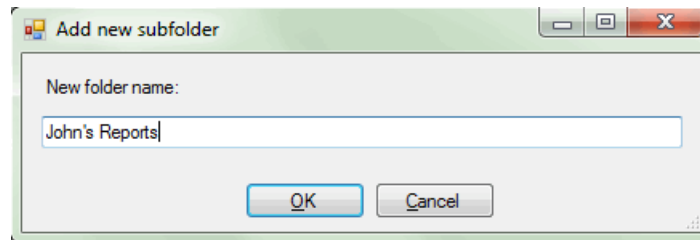
## 14 Managing Folders and Template Files

### 14.1 Creating a New Templates Folder

1. Start MXreport.
2. Right-click on folder named **REPORTS** in the tabbed **REPORT MANAGER** window.
3. From the contextual menu click **ADD SUBFOLDER**.



4. Enter the name of folder in the **ADD NEW SUBFOLDER** pop-up window.

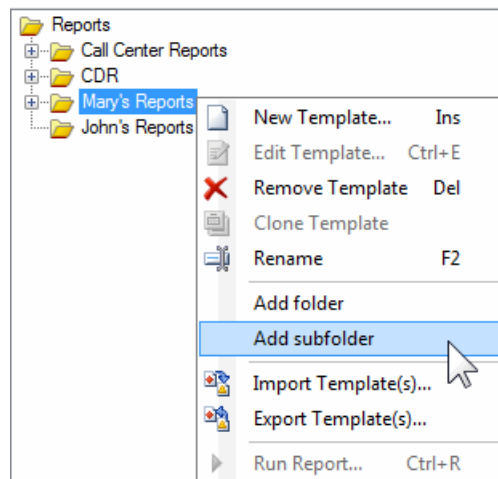


5. A new report templates folder is created.

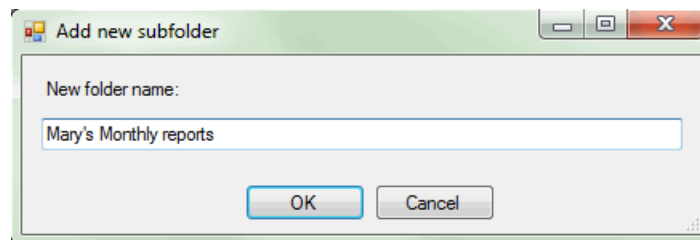


## 14.2 Creating a New Nested Templates Folder

1. Start MXreport.
2. Right-click on the master folder name in the tabbed **REPORT MANAGER** window in which you are creating the sub-folder.
3. From the contextual menu click on **ADD SUBFOLDER**.



4. Enter the name of folder in the **ADD NEW SUBFOLDER** pop-up window.



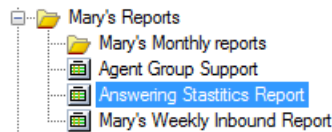
5. A new nested templates folder is created.



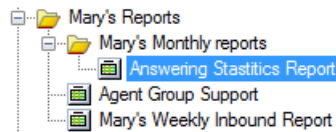


### 14.3 Moving a Report Template

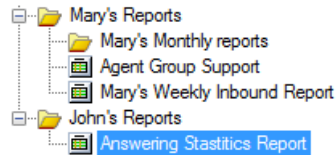
1. Start MXreport.
2. In the tabbed **REPORT MANAGER** window, select the report template by clicking on the folder's name to highlight it.



3. To move template within the same folder, drag the template to the new location.

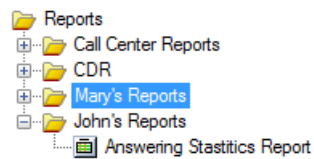


4. To move template to a different folder, drag the template to that folder.

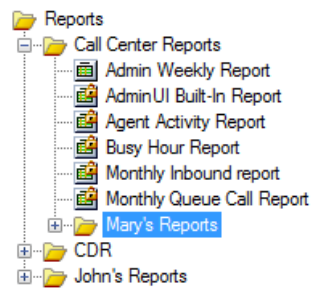


## 14.4 Moving a Template Folder

1. Start MXreport.
2. In the tabbed **REPORT MANAGER** window, select the report folder by clicking on the folder's name to highlight it.



3. Drag the folder to the new location in the folder tree.



## **15 Troubleshooting**

**User is unable to install MXreport software.**

Installer must have Microsoft Administrator privileges.

**MXreport Log-In failed.**

Check that your MXreport log-in information is correct.

**Some data fields are grayed out and not useable.**

Access to data fields is call group dependent – Operator, ACD Group, Hunt Group, or ICC group. Some fields are not applicable and will not be available depending on the group.

**I do not have the capability for creating Call Center/Call Group reports.**

MXreport (ICC) is a separate MXreport license that is needed to create Call Center/Call Group reports.

## **Appendix A – List of Existing Preformatted Reports**

The MX system automatically comes with over 34 comprehensive, preformatted management reports that are accessible on-demand from the MX Administrator interface. These reports have a fixed design and cannot be altered. The reports are:

### **Account Codes – Detailed or Summary**

Displays the individual calls or total number of calls that were charged to each account code.

### **Automated Call Distribution (ACD) Call Service - Summary**

Displays daily call waiting statistics for ACD groups. This report provides information on the amount of time callers waited in queues before speaking to an ACD agent.

### **ACD Detailed Group Report**

Displays the complete call sequence for ACD calls that are routed to other ACD groups or users.

### **ACD Performance - Detailed or Summary**

Displays common performance indicators for agents in each ACD group.

### **Agent Login and Logoff Activity - Detailed or Summary**

Displays the initial login, final logoff, and total logged on time for all agents in each ACD group during a specified period.

### **Auto Attendant Usage**

Displays the input activity for each Auto Attendant input option. This report displays the input option selected, date, time, action, and calling party number.

### **Call-Back Requests - Detailed or Summary**

Displays the number of call-back requests relative to the total number of calls received by an ACD group.

### **Call-back Status - Detailed or Summary**

Displays the call-back status for each agent in ACD groups.

### **Call Queue - Summary**

Displays daily call queue information about the disposition of calls that entered ACD Groups.

### **Calls by ACD Group - Detailed or Summary**

Displays the calls made and received by each agent in each ACD group.

### **Calls by Extension - Detailed or Summary**

Displays the daily volume and duration of calls to the specified extensions. Calls are categorized as Internal, Outbound, and Inbound.

**Calls by Operator Group - Detailed or Summary**

Displays the total number of calls made and received by each Operator Group.

**Calls Handled by Automated Attendant - Detailed or Summary**

Displays the time, date, duration, direction, transfer information, and number for each call handled by the Automated Attendant.

**Dial Plan Activity - Detailed or Summary**

Displays the calls made for each dialing rule in the system's dial plan.

**Emergency Calls**

Displays calls made to emergency numbers as specified in the dial plan. Information provided for each call includes date, time, user, number dialed, route, and duration.

**Longest Calls**

Displays the 20 longest calls during the specified interval.

**Most Active Extensions**

Displays the 20 most active extensions, measured by the number of voice calls for each extension.

**Most Frequently Called Numbers**

Displays calling statistics for the 20 most active extensions during the specified interval.

**Presence by Group - Detailed or Summary**

Displays the average total time spent by each ACD group within each Presence state.

**Presence by User - Detailed or Summary**

Displays the percentage of time each user spends at each Presence state. Records are grouped by user profile, user, and date.

**Trunk Group Activity - Detailed**

Displays the number of calls made using each trunk group.

## Appendix B – CDR Report Fields

The following is a list of the 57 data fields available within a CDR report. They are grouped by function. In the left column is MXreport's identifier name. In the right column is an explanation of the data contained within that field.

### Time

<b>Connect Time</b>	Time the Call Was Connected and a Voice Session Was Initiated
<b>Creation Time</b>	Time the Call Was Created (Dialed from or Reached the MX IP PBX)
<b>Disconnect Time</b>	Time the Call Was Terminated
<b>Call Time:</b>	
<b>Date and Time</b>	Date and Time When Call Began
<b>Date</b>	Date When Call Began
<b>Time</b>	Time When the Call Began
<b>Time with Seconds</b>	Time When the Call Began to the second
<b>Hour</b>	Hour When the Call Began
<b>Quarter Hour</b>	Quarter-Hour When the Call Began
<b>Day of Week</b>	Day of Week When the Call Began
<b>Week</b>	Week When Call Began
<b>Month</b>	Month When Call Began
<b>Year</b>	Year When Call Began

### Call Info

<b>Account Code</b>	Account Code
<b>Account Client</b>	Account Client
<b>Call ID</b>	A unique MX-Generated ID of a Call Segment to Track the Life of a Call
<b>Dial Plan</b>	The MX Dial Plan Used
<b>Session Duration</b>	Length between Connect and Disconnect
<b>Ring Duration</b>	Length between Creation and Connect
<b>Action</b>	What Action Terminated a Call Segment (End of Call, Transfer to Another Number, etc)
<b>Termination Initiator</b>	Who Terminated the Call?
<b>Answered</b>	Was the Call Answered?

<b>ACD Result</b>	Status of ACD Call (Abandoned, Delivered, Transferred to VM, etc)
<b>Direction</b>	Was the Call Incoming or Outbound?

**Caller (Person Calling)**

<b>Calling Party #</b>	An External or Internal Phone Number (Extension) of the Calling Party
<b>Caller Name</b>	The Name of the Caller (User's Name, ACD Group and Agent Name, etc)
<b>Caller Type</b>	User, External, Agent
<b>Caller ID Name</b>	Caller ID shown
<b>Caller First Name</b>	Caller's First Name
<b>Caller Last Name</b>	Caller's Last Name
<b>Caller Extension</b>	Caller's Extension Number
<b>Caller Trunk Group</b>	Trunk Group of Caller
<b>Caller ACD Name</b>	ACD Group Name for Agents

**Recipient – (Person Called)**

<b>Original Called #</b>	Phone Number Being Called
<b>Called Party #</b>	Phone Number Answering the Call
<b>Recipient Type</b>	User, External, Agent
<b>Recipient Name</b>	the Name of the Caller (User's Name, ACD Group + Agent Name, etc)
<b>Recipient First Name</b>	Recipient's First Name
<b>Recipient Last Name</b>	Recipient's Last Name
<b>Recipient User Extension</b>	Recipient's Extension Number
<b>Recipient User Name</b>	Recipient's First and Last Name
<b>Recipient ACD Activity</b>	Was the Recipient ACD-Related
<b>Recipient ACD Name</b>	ACD Group Name For Agents
<b>Recipient Service Name</b>	Recipient's Service Name
<b>Recipient ACD Extension</b>	ACD Extension of Agent
<b>Recipient Trunk Group</b>	Trunk Group of Agent

**Call Attached Data (Custom Fields – See Zultys' *Call Attached Data Manual*)**

## Appendix C – Call Center/Call Group Report Fields

The following is a list of the 23 data fields available within a Call Center/Call Group Report. They are grouped by function.

### General

Data Field	Applicable To:		Short Description	Full Description
	Call Group	Agent		
<b>Service Level</b>	Yes	No	Percentage of inbound calls answered in "x" seconds	Calculated as a percentage of all calls. Parameter - time to answer
<b>Call Count</b>	Yes	Yes	Number of inbound calls and/or number of outbound calls	For queue - calls delivered to queue, or made on behalf of queue; For agent - calls delivered to agent or made by agent;
<b>Answered</b>	Yes	Yes	Number or Percentage of calls answered	Only calls answered in a particular group are counted. If a call is transferred outside the group, it is not included even if it was answered later
<b>Time to Answer</b>	Yes	Yes	Time in queue prior to being answered (min, max, average)	Time from when an inbound call reaches a queue, to the time it is answered.
<b>Time to Answer: Intervals</b>	Yes	Yes	Number or Percentage of calls answered within a defined interval	Time from when an inbound call reaches a queue, to the time when it is answered.
<b>Abandoned</b>	Yes	No	Number or Percentage of time caller abandoned the call between entering queue and hanging up	Calls disconnected by caller while in queue. Absolute amount or percentage of all calls
<b>Time to abandon</b>	Yes	No	Time in queue prior to abandonment (min, max, average)	Time in queue prior to abandonment (min, max, average)



<b>Time to abandon: Intervals</b>	Yes	No	Number or percentage of calls abandoned in a defined interval	Time in queue prior to when call was abandoned
<b>Redi- rected</b>	Yes	No	Calls transferred out of queue by caller request or by call handling rules (min, max, average)	Call could not be accepted in queue (e.g. no agent was logged in), or was transferred out of queue by an overflow rule or else by a caller request (pressed # or 0)
<b>Discon- nected</b>	Yes	No	Number or percentage of calls disconnected by call handling rules while in queue	A call rule terminates call (e.g. call is too long in queue)
<b>Missed Calls Ring No answer (RNA)</b>	Yes	Yes	Number of unanswered calls presented to logged-in agent	A call is directed to an agent that is logged in and who has Available presence, but the call is not answered. After timeout, the call is processed by RNA rules
<b>To VoiceMail</b>	Yes	No	Number or percentage of calls directed to group's voicemail	Call may have been redirected to voicemail by an overflow rule or by caller's request
<b>Talk Time</b>	Yes	Yes	Time agent is connected to caller including hold time	Time agent is on the phone with an inbound calls or outbound call or total. Can be calculated for multiple or all agents in one group, or one agent in multiple groups
<b>Talk Time: Intervals</b>	Yes	Yes	Number or percentage of calls connected and active within a defined interval	Time agent is on the phone for inbound calls, outbound calls or total. Can be calculated for multiple or all agents in one group, or one agent in multiple groups
<b>Hold Time</b>	Yes	Yes	Time agent has put calls on hold	Time agent has put active call on hold. This value can be calculated for multiple or all agents in one group, or for one agent in multiple groups
<b>Hold Time: Intervals</b>	Yes	Yes	Number or percentage of time calls have been put on hold within a defined time interval	Time agent has put active call on hold. This value can be calculated for multiple or all agents in one group, or one agent in multiple groups

<b>Queue Size</b>	Yes	No	Number of calls simultaneously in queue (min, max, average)	Number of calls simultaneously in queue (min, max, average)
<b>Callback requests</b>	Yes	No	Number of callback requests	Number of callback requests

**Presence**

<b>Data Field</b>	<b>Applicable To:</b>		<b>Short Description</b>	<b>Full Description</b>
	<b>Call Group</b>	<b>Agent</b>		
<b>Logged In</b>	Yes	Yes	Total agent log-in time	Total logged in time. For multiple groups it is calculated as total time when agent was logged in to at least one group
<b>Available</b>	Yes	Yes	Amount or percentage of time agent is logged in and is available but is not active on a call	Total time agent was available within all call groups. Absolute amount, or percentage of total log-in time in groups
<b>Not Available</b>	Yes	Yes	Amount or percentage of time agent is on break and is unavailable.	Total time agent was on break within all call groups. Absolute amount, or percentage of total on break time in groups
<b>On call</b>	Yes	Yes	Percentage of total logged in time active on call On call is same as talk time)	Total time agents spent on inbound and outbound calls on behalf of groups. Calculated as an absolute value or a percentage of login time
<b>User presence</b>	Yes	Yes	Any user presence combinations	Time accounted if requested presence was set when agent was logged in to any of requested groups; Calculated as absolute time or percentage of logged In time